

HR505

Organizational Management

EXERCISES AND SOLUTIONS

Course Version: 15

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

Example text

Window title

Example text

VLC About This Handbook

About This Handbook

This handbook provides you with basic information for attending your virtual live classroom session.

Adobe Connect Support Information

Web and audio support is available by:

- Pressing *0 from within the audio-conferencing
- Calling the support hotline numbers listed below
- Emailing the PGi support hotline below

Global PGi Support Hotline for SAP Education (24/7)

Tel: +1 800-368-1945

Tel: +1 719-234-7915

Note: After dialing in, press option 2 for technical support. You will then be presented with two options – press 1 for Audio support, or press 2 for Web support.

Email: sapedsupport@premiereglocal.com

Setting up your Learning Environment

Ideally you want to be in a private room when participating in a synchronous (live) event. In reality, you may not be able to arrange that. Here are some tips for maximizing your learning environment:

- Create an inspirational office/studio to work in
- Use a comfortable chair
- Use well designed and functional computer peripherals
- Keep a log or journal of notes and ideas you can use for future sessions

Before your online class:

- Tell co-workers you will be in class (send e-mail)
- Post a sign indicating when you will be free again (when class is over)
- Use a headset instead of your computer speakers to minimize disruption of others
- Ignore people who try to get your attention
- Turn off the ringers / alerts on telephone, pager, and cell phone
- Turn off e-mail and instant message alerts
- Remove other distractions lying on your desktop
- Keep a glass of water at your desk

Teleconferencing ground rules:

- Use the mute button or press *6
- Do not place call on hold

- Use the "Raise hand" icon in the Attendee List: My Status to indicate you want to ask a question
- Identify yourself before speaking, when not called on
- Charge the batteries for your cordless handset
- If possible use a land line instead of your cell phone

Minimum Hardware Requirements

- PC with 1.4 GHz processor or higher (Windows) or 1.83 GHz process or higher (Mac OS). Minimum processor required for screen sharing. You may be asked to share your screen during hands-on exercise portions of the class.
- 17 inch or larger monitor is recommended, set at 1024 X 768. Larger monitor and 1024 X 768 setting will make presentation and system screens easier to read.
- Phone with Headset/Microphone or Speakerphone feature – to maximize student listening and comfort during presentation and demonstration portions of the course.

Software Requirement

A complete list of supported Operating Systems, browsers and additional requirements for Adobe® Acrobat® Connect™ can be found at: www.adobe.com/products/acrobatconnectpro/systemreqs

Sample Email to Notify Others You Are in a Virtual Class

This is a sample of an email you can send to your colleagues and manager when you are taking an online course.

Dear colleagues,

Today I will be participating in an online class from my desk. I will be online from approximately 9:30 a.m. to 5:30 a.m. EST. I would appreciate it if you would not disturb me during this time. If you have an immediate question, please contact Joe Smith at extension 123. If it can wait until after 11:00 a.m., please send me an email and I will follow up with you before the end of the business day. I appreciate your consideration.

Best regards,

Getting the Most Out of Your Session

Session Guidelines

- Turn off email, phones, instant messaging tools, and clear other distractions away from your training area.
- Participate and prepare to be called on by name.
- Use the "Raise Hand" icon if you have an immediate question or comment.
- Be patient waiting for a response to your chat messages.
- If you leave the program, please use the "Step Away" status icon in the Attendee List pod to let your instructor know when you leave and remember to clear it when you return.

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Find Object Relationships

Business Example

Before you create an organizational plan, you must understand how the OM objects and relationships best represent the structure of your organization.

1. Find object types that can use the following relationships:
 - A/B 007
 - A/B 003
 - A 011
 - A/B 002
 - A/B 008
2. Find some examples of relationships for the objects types listed in the table. It is not necessary to capture all of the relationships just a sampling of the allowed relationships between the main objects.

Relationship	Objects (Examples)	Relationship Name
A/B 007		
A/B 003		
A 011		
A/B 002		
A/B 008		

Find Object Relationships

Business Example

Before you create an organizational plan, you must understand how the OM objects and relationships best represent the structure of your organization.

1. Find object types that can use the following relationships:

- A/B 007
- A/B 003
- A 011
- A/B 002
- A/B 008

a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Relationship Maintenance* → *Maintain Relationships*.

b) Select an entry (such as 002) and double-click *Allowed Relationships* in the dialog structure.

2. Find some examples of relationships for the objects types listed in the table. It is not necessary to capture all of the relationships just a sampling of the allowed relationships between the main objects.

Relationship	Objects (Examples)	Relationship Name
A/B 007		
A/B 003		
A 011		
A/B 002		
A/B 008		

- a) Examples of relationships and objects include the following:

Relationship	Objects (Examples)	Relationship Name
A/B 007	C - S / S - T / C - T	Describes or is described by
A/B 003	O - S	Belongs to or incorporates
A 011	O - K / S - K	Cost center assignment

Relationship	Objects (Examples)	Relationship Name
A/B 002	O - O / S - S	Reports to or is line supervisor of
A/B 008	S - P / S - US	Holder

Confirm the Active Plan Version

Business Example

Before you create an organizational plan, you must understand how the OM objects and relationships will best represent the structure of your organization.

Use the project Customizing to understand the structure of OM.

1. List the possible uses for plan versions.
2. How many plan versions can be integrated with other SAP components? How can you prove this in Customizing?
3. What are the five plan statuses?

Confirm the Active Plan Version

Business Example

Before you create an organizational plan, you must understand how the OM objects and relationships will best represent the structure of your organization.

Use the project Customizing to understand the structure of OM.

1. List the possible uses for plan versions.
 - a) Examples of possible uses for plan versions are as follows:
 - Integrated plan version
 - Create planning scenarios
2. How many plan versions can be integrated with other SAP components? How can you prove this in Customizing?
 - a) Only the integrated plan version can be integrated with other SAP components. In the standard delivery, this is plan version 01– Current Plan. To determine this in Customizing, choose *Personnel Management* → *Global Settings in Personnel Management* → *Plan Version Maintenance* → *Set Active Plan Version*.
3. What are the five plan statuses?
 - a) The five plan statuses are:
 - Active
 - Planned
 - Submitted
 - Approved
 - Rejected



Note:

To view these statuses, you need to perform the following steps:

- a) Execute transaction PP01
- b) On the *Maintain object* screen, you can see the statuses as tab pages.

List Object Characteristics

Business Example

Before you create an organizational plan, you must understand how OM objects and relationships can best represent the structure of your organization.

Identify object characteristics.

1. What are the main characteristics of an object?

2. Can a person hold a job in OM? How can you prove this in Customizing?

3. The higher-level organizational unit of a structure has a relationship to cost center 1000. There are two subordinate organizational units. Subsidiary 1 has a relationship to cost center 2000. Subsidiary 2 has no cost center assignment. Which cost center would positions under the parent organizational unit inherit? What cost center would positions under Subsidiary 1 inherit? Which cost center would positions under Subsidiary 2 inherit?

List Object Characteristics

Business Example

Before you create an organizational plan, you must understand how OM objects and relationships can best represent the structure of your organization.

Identify object characteristics.

1. What are the main characteristics of an object?

The main characteristics of an object are the Object and Relationships infotypes.

- a) *Object* infotype (IT1000) has the following data fields:

- *Plan Version*
- *Object Type*
- *Object ID*
- *Object Name*
- *Abbreviation*
- *Plan Status*
- *Validity Period*
- *Language*

This infotype defines the existence of an organizational object.

- b) *Relationships* infotype (IT1001)

This infotype gives objects their relevance because of their relationship to other objects. An object without relationships is not evaluated in the structure and has no value in OM.

2. Can a person hold a job in OM? How can you prove this in Customizing?

It is not possible for a person to hold a job. A person may only hold a position.

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Relationship Maintenance* → *Maintain Relationships*.

- b) Select entry 008, which depicts the staffing of positions, and double-click *Allowed Relationships*. Notice there is no relationship between *Job* and *Position*.

3. The higher-level organizational unit of a structure has a relationship to cost center 1000. There are two subordinate organizational units. Subsidiary 1 has a relationship to cost center 2000. Subsidiary 2 has no cost center assignment. Which cost center would positions under the parent organizational unit inherit? What cost center would positions under Subsidiary 1 inherit? Which cost center would positions under Subsidiary 2 inherit?
- a) Positions under the parent organizational unit would inherit cost center 1000.
 - b) Positions under Subsidiary 1 would inherit cost center 2000.
 - c) Positions under Subsidiary 2 would inherit cost center 1000.

Create Objects in the Organizational Plan

Business Example

The organizational plan of your enterprise changed on 01.01 this year. You now have to maintain the changes using the *Organization and Staffing* interface.

Use the *Organization and Staffing* user interface to create objects.



Note:

Choose  (SAP Menu) before you start the exercise.

Task 1:

1. Call the *Organization and Staffing Change* interface.
2. Use **01.01** of the current calendar year as the start date of your editing period. The period under examination is **3 years**.
3. Set the period query for organizational changes.

Task 2:

Create new objects in the organizational plan according to the following figure.

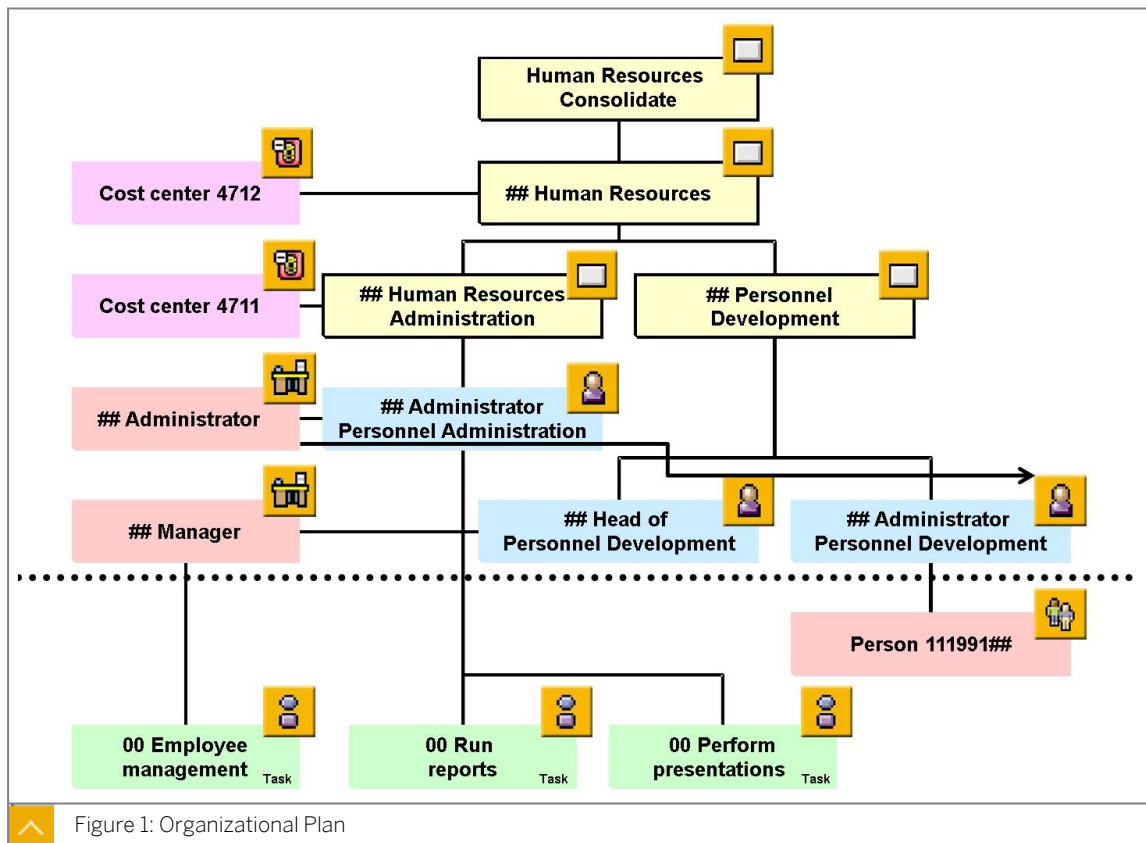


Figure 1: Organizational Plan



Note:

Use your group number (##) as a prefix for all of your object names and abbreviations (01-Organizational Unit, 01-Position, for example).

Make sure that you are in the current plan version.

Create your **## Human Resources** organizational unit under the existing organizational unit *Human Resources Consolidate*. Leave the existing organizational units unchanged.

1. Create the new organizational units in your organizational plan and link the cost centers to them. Use F4 help for the search and remain in company code *CABB*.
2. Create positions defined by jobs and relate them to your organizational units. Designate the position **## Head of Personnel Development** as the manager of the Head of the **## Personnel Development** organizational unit. Hint: To limit the overview area to display only your new Organizational Units you can select your **## Human Resources** and choose Go To -> Staff Assignment structures. This will reset the top object in the overview area to your **## Human Resources**.

Task 3: Enhance your new organizational structure by adding another organizational unit **## Payroll** and two additional positions **## Payroll Manager** and **## Payroll Clerk**.

1. Add the **## Payroll** organizational unit to your **## Human Resources** organizational unit.
2. Create the **## Payroll Manager** position.
3. Create the **## Payroll Clerk** position.

Create Objects in the Organizational Plan


Business Example

The organizational plan of your enterprise changed on 01.01 this year. You now have to maintain the changes using the *Organization and Staffing* interface.

Use the *Organization and Staffing* user interface to create objects.



Note:

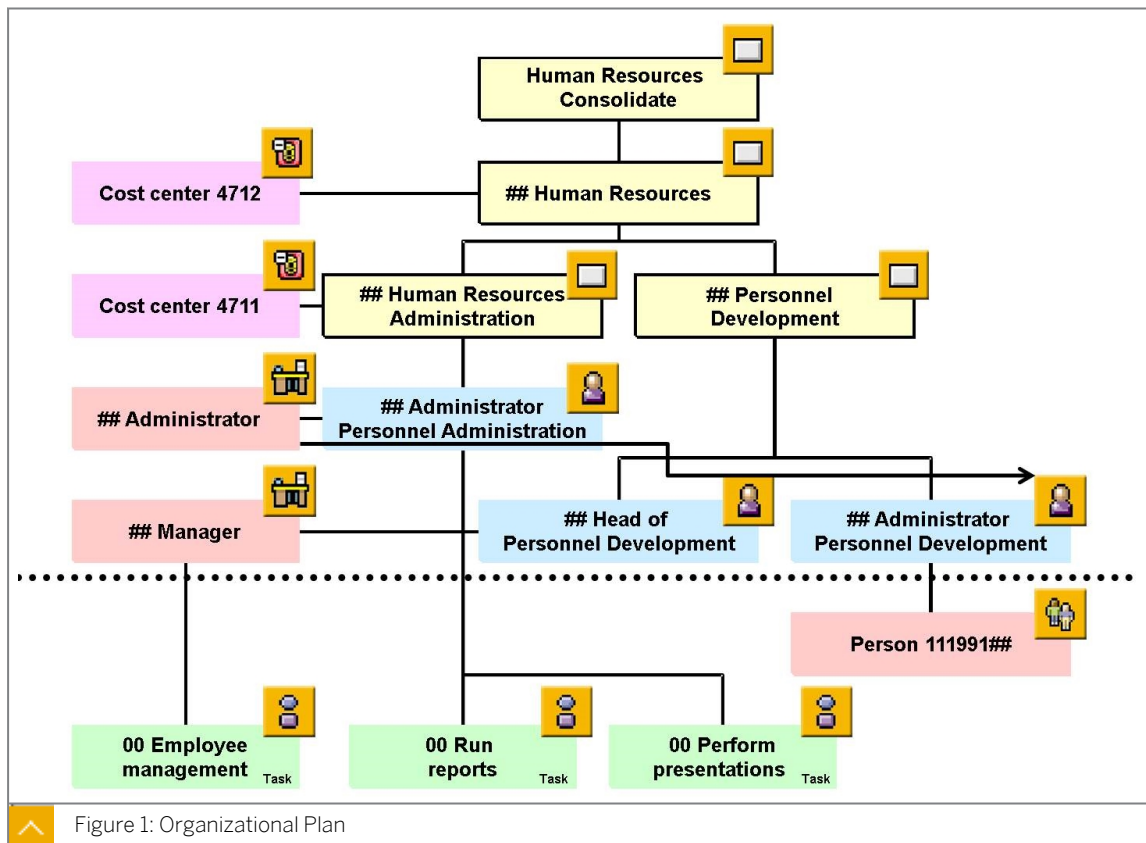
Choose  (SAP Menu) before you start the exercise.

Task 1:

1. Call the *Organization and Staffing Change* interface.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *Organization and Staffing* → *Change*.
2. Use **01.01** of the current calendar year as the start date of your editing period. The period under examination is **3 years**.
 - a) On the *Organization and Staffing Change* screen, click the *Date and preview period* pushbutton.
 - b) In the *Start date* field, enter **01.01** of the current year as the date.
 - c) In the *Time period* field, enter **3 years** as the preview period.
 - d) Choose the *Execute* pushbutton.
3. Set the period query for organizational changes.
 - a) Choose *Settings* → *Query Time Period/Create Several Objects*.
 - b) In the *Query Time Period/Create Several Objects* dialog box, select the checkbox and choose *Continue*.

Task 2:

Create new objects in the organizational plan according to the following figure.



Note:

Use your group number (##) as a prefix for all of your object names and abbreviations (01-Organizational Unit, 01-Position, for example).

Make sure that you are in the current plan version.

Create your **## Human Resources** organizational unit under the existing organizational unit *Human Resources Consolidate*. Leave the existing organizational units unchanged.

1. Create the new organizational units in your organizational plan and link the cost centers to them. Use F4 help for the search and remain in company code *CABB*.
 - a) On the *Organization and Staffing Change* screen, in the *Find by* section, choose *Organizational Unit* and then choose *Search Term*.



Hint:

You can also use *Structure Search* to find your objects.

- b) In the *Find Organizational Unit* dialog box, enter **Human*** in the *With Name* field.
- c) Choose the *Find* pushbutton.
- d) In the search area, double-click *Human Resources Consolidate*. Choose the *Goto* button and choose *Staff Assignments (Structure)*.

The *Staff Assignments (Structure)* for the organizational units is displayed in the overview area.

e) Select the HR Consolidate Organizational Unit and then choose the *Create* icon.

f) The *Choose Relationship* dialog box appears. You are asked what kind of object you wish to create (position or organizational unit). Choose *Organizational Unit* and then choose *Continue*.

g) In the *Create Organizational unit* dialog box, enter **## HR** in the *Object Abbreviation* field, **## Human Resources** in the *Object Name* field, and choose *Continue*.

The relationship between the organizational units is created automatically.

h) On the *Account Assignment* tab page, link your new organizational unit to a cost center in the detail area. Choose the *Account Assignment* tab page and choose the input help for the *Master Cost Center* field. The *Master Cost Center (1)* dialog box is displayed.

i) In the *Master Cost Center* dialog box, enter **CABB** in the *Company Code* field and choose *Continue*.

From the displayed list, choose the entry with the short text *Administration* and then choose *Continue*.

j) Choose the *Basic Data* tab page.

To create two subordinate organizational units, in the overview area, double-click your higher-level organizational unit (**## Human Resources**), and choose the *Create* pushbutton. In the *Choose Relationship* dialog box, choose *Organizational Unit* and then choose *Continue*.

In the *Create Organizational Unit* dialog box, enter the short text and name for your two new organizational units. Name your two subordinate organizational units **## Human Resources Administration** (with the short text **## HR Admin**) and **## Personnel Development** (with the short text **## PD**). Choose *Continue*.

k) Save your organizational structure.

2. Create positions defined by jobs and relate them to your organizational units. Designate the position **## Head of Personnel Development** as the manager of the **## Personnel Development** organizational unit. Hint: To limit the overview area to display only your new Organizational Units you can select your **## Human Resources** and choose *Go To -> Staff Assignment structures*. This will reset the top object in the overview area to your **## Human Resources**.

a) Create positions defined by jobs and link them to your organizational units. Ensure you are in the *Staff Assignments (Structure)* view. In the overview area, double-click the organizational unit **## Human Resources Administration**.

b) Choose the *Create* pushbutton. In the *Choose Relationship* dialog box, choose *Position* and then choose *Continue*. The relationship to the organizational unit is created automatically.

c) Enter the short text **## PA Admin** and name the new position **## Admin Personnel Administration**.

d) Assign the job **## Administrator** to your **## PA Admin** position.



Hint:

The naming convention for the jobs that already exist in the system is **##***.

- e) Double-click your **## PA Admin** position in the overview area of the *Organization and Staffing* interface.
- f) To search for an existing job, go to the detail area on the *Basic Data* tab page and enter **## adm*** (**##** is your group number) in the *Job* field. Then choose *Search*.
From the generated list, choose the first entry **## Administrator** (the one beginning with a 5), and choose *Continue*. The job **## Administrator** is assigned to your position.
- g) Double-click your **## Personnel Development** organizational unit and choose *Create*. In the *Choose Relationship* dialog box, choose *Position* and then choose *Continue*. For your first position, enter the short text **## PD Admin** and the name **## Administrator Personnel Development**. For your second position, enter the short text **## PD Mgr** and the name **## Head of Personnel Development** and choose *Continue*.
- h) Designate your position **## Head of Personnel Development** as the head of the **## Personnel Development** organizational unit.
Double-click the position **## Personnel Development** in the overview area of the *Organization and Staffing* interface. On the *Basic Data* tab page in the detail area, select the *Head of Own Organizational Unit* checkbox.
- i) Assign the position to the job **## Manager**. On the *Basic Data* tab page, select the search help for the job field. In the *Job* dialog box, enter **## man*** in the *Search Term* field and choose *Start Search*. Choose **## Manager** and then choose *Copy*.
- j) Save your entries and remain on the *Organizational and Staffing* interface screen.

Task 3: Enhance your new organizational structure by adding another organizational unit **## Payroll** and two additional positions **## Payroll Manager** and **## Payroll Clerk**.

1. Add the **## Payroll** organizational unit to your **## Human Resources** organizational unit.
 - a) Click your **## Human Resources** organizational unit and choose *Create*.
 - b) Choose the line Supervisor relationship and enter **## Payroll** in both the short and long text fields.
 - c) Choose *Save*.
2. Create the **## Payroll Manager** position.
 - a) Click the **## Payroll** organizational unit and choose *Create*.
 - b) Choose the Incorporates relationship and enter **## Pay Man** as the short text and **## Payroll Manager** as the long text for the position.
 - c) Select the Chief checkbox.
 - d) In the job field, enter **50*** and click the drop-down arrow.
 - e) Select **50 Manager** from the list and *Save*

3. Create the **## Payroll Clerk** position.

- a) Click the **## Payroll**, choose the Incorporates relationship and enter **## Pay C1** as the short text and **## Payroll Clerk** as the long text for the position and choose *Continue*.
- b) In the job field, enter 50* and click the drop-down arrow.
- c) Select 50 Clerk from the list and Save.



Note:

You will assign existing employees to your new positions in a later activity

Assign an Object

Business Example

You have created new objects in the organizational plan and have to assign tasks and persons using the *Organization and Staffing* interface.

Assign tasks and holders using the *Organization and Staffing* interface.

1. Link the job ## *Manager* and the position ## *Administrator Personnel Administration* with the relevant tasks.



Hint:

Use drag and drop or the *Assign* pushbutton to link tasks and holders. If you need to make a correction, choose *Undo*. Follow the guidelines and make sure you enter appropriate validity periods for all objects.

2. Link the position ## *Administrator Personnel Development* with a holder. This person already exists as personnel number *111991##*.

Assign an Object

Business Example

You have created new objects in the organizational plan and have to assign tasks and persons using the *Organization and Staffing* interface.

Assign tasks and holders using the *Organization and Staffing* interface.

1. Link the job **## Manager** and the position **## Administrator Personnel Administration** with the relevant tasks.



Hint:

Use drag and drop or the *Assign* pushbutton to link tasks and holders. If you need to make a correction, choose *Undo*. Follow the guidelines and make sure you enter appropriate validity periods for all objects.

- a) In the command field of the *SAP Easy Access* screen, enter the transaction code **PPOME** and choose *Enter*.
 - b) To switch to the *Task Assignment* view, on the *Organization and Staffing Change* screen, double-click your organizational unit **## Human Resources**, choose the *Goto* pushbutton, and then choose the *Task Assignment* view.
 - c) In the overview area of the *Task Assignment* screen, choose **## Human Resources** → **## Human Resources Administration**. Double-click **## PA Admin**.
In the *Find by* section of the object manager, choose *Task*.
Under *Task*, double-click *Search Term*.
In the *Find Task* dialog box, enter **00*** in the *With Name* field and choose *Continue*.
 - d) The selection area contains tasks that can be assigned to your position using drag and drop.
Click **00 Runs Reports** and drag it to your **## Admin Personnel Administration** position. The *Assign Task* dialog box is displayed. Choose *Continue* to accept the validity dates.
Assign the task **00 Employee Management** to your **## Head of Personnel Development** by following the previous steps.
 - e) Save your entries.
2. Link the position **## Administrator Personnel Development** with a holder. This person already exists as personnel number **111991##**.
 - a) In the *Find by* section of the object manager, choose *Person*.
 - b) In the *Restrict Value Range* dialog box, enter **Becker** in the *Last Name* field and choose *Continue*.

- c) Left click personnel number *111991##* in the hit list and drag it onto your position *## Administrator Personnel Development*. Select *Set Date for Relationship* in the *Person Assign* dialog box. Select the *Set the date for relationship* in the *Person Assign* dialog box. Choose *Continue*.

The *Delimit Vacancy* dialog box displays. Choose *Yes* to end the vacancy of the position.

- d) Save your entries.

Maintain Infotypes

Business Example

After you have implemented OM and it is in productive use, your company's organizational plan changes. You need to maintain infotypes in Expert Mode to create and maintain the characteristics of individual objects. In the third task of the exercise, you create and test an organizational management action.

Use Expert Mode to maintain infotypes and edit your organizational plan.



Note:

Use your group number (##) as a prefix for all of your object names and abbreviations (01-Organizational Unit, 01-Position, for example).

Ensure that you are in the active plan version. Use input help for the Plan Version field and confirm you are using the Current Plan. Work on the Active tab.

Use 01.01 of the current calendar year as the start date for your editing period.

Choose  (SAP Menu) before you start the exercise.

Task 1

Create objects in infotype maintenance.

1. Create a work center in infotype maintenance. The name of your work center should be ##-Office.
2. Link your work center to your ## Head of Personnel Development position (relationship A/B 003).

Task 2

Maintain an organizational plan.

To maintain planned compensation in a pay grade structure, use the data in the table:



Field	Value
Country grouping	Other countries
Pay group type	01
Pay group area	01
Pay group	E03
Pay group level	01

1. Create a *Planned Compensation* infotype record for the job ## *Manager* using the data listed in the table.
2. Create an *Employee Group or Subgroup* infotype record for the ## *Head of Personnel Development* position using the following values:

Field Name	Value
<i>Employee group</i>	Active
<i>EE subgroup</i>	X0

3. Maintain the *Work Schedule* infotype for your organizational unit ## *Human Resources*. Enter **40** hours per week (for all work schedule groups). Flag 40 hours per week as the general work schedule.
4. Create an *Acct Assignment Features* infotype record for your position ## *Head of Personnel Development*.
Enter the following data:

Field Name	Value
<i>Company Code</i>	CABB
<i>Business Area</i>	None
<i>Personnel Area</i>	CABB
<i>Personnel Subarea</i>	0002

5. Review the changes you have made in the *Organization and Staffing* interface. Identify the changes that are not displayed here.

Task 3: Create and Test an Organizational Management Action

When new positions are created you want to ensure that all the appropriate organizational management infotypes are associated with the new position. This data should default onto the PA infotypes when hiring into one of these positions. You will require new positions be created using an Organizational Management Action

These mandatory infotypes include the Object Infotype, The Relationship Infotype with relationships to the Organizational Unit, Cost Center, and Job.

Upon hiring on the PA side, a default rate of pay should be presented. The default values for Personnel Area, Personnel Subarea, Employee Group, and Employee Subgroup should also default onto the Organizational Assignment Infotype (0001). Your new action is valid for all Plan Statuses.

1. Create the Organizational Management Action.
2. Test your newly created Action.
3. Test your defaults by hiring someone into the position. You should see the Cost Center, Organizational Unit, describing job, Personnel Area, PSA, EG and ESG default on IT0001 and you should see the default rate of pay appear on IT0008, Basic Pay.

Maintain Infotypes

Business Example

After you have implemented OM and it is in productive use, your company's organizational plan changes. You need to maintain infotypes in Expert Mode to create and maintain the characteristics of individual objects. In the third task of the exercise, you create and test an organizational management action.

Use Expert Mode to maintain infotypes and edit your organizational plan.



Note:

Use your group number (##) as a prefix for all of your object names and abbreviations (01-Organizational Unit, 01-Position, for example).

Ensure that you are in the active plan version. Use input help for the Plan Version field and confirm you are using the Current Plan. Work on the Active tab.

Use 01.01 of the current calendar year as the start date for your editing period.

Choose  (SAP Menu) before you start the exercise.

Task 1

Create objects in infotype maintenance.

1. Create a work center in infotype maintenance. The name of your work center should be ##-Office.
 - a) To access infotype maintenance, on the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Expert Mode* → *Work Center*. Hint: If an object ID number appears in the work Center field, delete it before choosing create. This ID is from the last object your worked with and is not a Work Center.
 - b) On the *Maintain Work Center* screen, choose the *Object* infotype and then choose the *Create* pushbutton.
 - c) On the *Create Object* screen, enter the data from the table:

Field	Value
Object name	##-Office
Object abbr.	##-Office



Note:

Make sure the validity period is correct (01.01. of the current year to 12.31.9999).

- d) Save your entries.
2. Link your work center to your **## Head of Personnel Development** position (relationship A/B 003).
 - a) On the *Maintain Work Center* screen, choose the *Relationships* infotype and then choose the *Create* pushbutton.
 - b) After checking the validity period, enter the relationship type in the *Relationship Type/Relationship* field (in this case, **A 003**). Use the F4 help to select *Position* as the type of linked object.
 - c) Use the F4 help for the ID of the *Related Object* field to find the **## Head of Personnel Development** position by entering **##*** in the *Search Term* field and then choosing *Continue*. Choose **## Head of Personnel Development** and choose *Copy*. Hint: If your search returns a large list, use the validity dates to help find your positions.
 - d) Save your entries and return to the *SAP Easy Access* screen.

Task 2

Maintain an organizational plan.

To maintain planned compensation in a pay grade structure, use the data in the table:



Field	Value
<i>Country grouping</i>	Other countries
<i>Pay group type</i>	01
<i>Pay group area</i>	01
<i>Pay group</i>	E03
<i>Pay group level</i>	01

1. Create a *Planned Compensation* infotype record for the job **## Manager** using the data listed in the table.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Expert Mode* → *Job*.
 - b) Check that the current correct plan version and the correct validity period of 01.01 of the current year to 12.31.9999 are displayed, and then select the **## Manager** job you wish to maintain. Use input help and enter **## Manager** in the *Search Term* field and choose *Start Search*. Choose **## Manager** and choose *Copy*. On the *Maintain Job* screen, press ENTER.

**Note:**

Once your job and its infotypes are displayed, the infotypes that have been maintained for the position will be indicated by a green checkmark.

- c) On the *Maintain Job* screen, choose the *Planned Compensation* infotype and then choose the *Create* pushbutton.
 - d) Choose the *Pay Group* tab page and enter the corresponding values from the data listed in the table.
 - e) Save your entries and return to the *SAP Easy Access* screen.
2. Create an *Employee Group or Subgroup* infotype record for the **## Head of Personnel Development** position using the following values:

Field Name	Value
<i>Employee group</i>	Active
<i>EE subgroup</i>	X0

- a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Expert Mode* → *Position*.
 - b) Confirm that the plan version is *Current Plan* and validity period is *01.01* of the current year to *12.31.9999*. In the *Position* field, find **## Head of Personnel Development**. Choose *Input Help* and in the *Search Term* field, enter **## Head*** and choose *Start Search*. Choose **## Head of Personnel Development** and choose *Copy*. Press ENTER.
 - c) When the position and its infotypes are displayed on the *Maintain Position* screen, choose the *Employee Group/Subgroup* infotype. Then choose the *Create* pushbutton.
 - d) Enter **01.01** of the current year to **12.31.9999** in the *From* and the *To* fields, respectively.
 - e) Use the F4 help to find the values *Active* for the *Employee Group* field and *X0* for the *EE subgroup* field.
 - f) Save your entries and return to the *SAP Easy Access* screen.
3. Maintain the *Work Schedule* infotype for your organizational unit **## Human Resources**. Enter **40** hours per week (for all work schedule groups). Flag 40 hours per week as the general work schedule.
- a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Expert Mode* → *Organizational Unit*.
 - b) In the *Organizational Unit* field, use input help to find **## Human Resources** to be maintained. Choose *Input Help* and in the *Search Term* field, enter **## Human*** and choose *Start Search*. From the list of the entries displayed, choose **## Human Resources** and choose *Copy*. On the *Maintain Organizational Unit* screen, press ENTER.
 - c) Choose the *Work Schedule* infotype.

- d) Check the organizational unit and the validity period are correct and choose the *Create* pushbutton.
- e) Enter the following data:

Field Name	Value
<i>Hours per Week</i>	40
<i>Work Schedule Group</i>	All work schedule groups
<i>Std working time</i>	Selected

- f) Save your entries and return to the *SAP Easy Access* screen.

4. Create an *Acct Assignment Features* infotype record for your position **## Head of Personnel Development**.

Enter the following data:

Field Name	Value
<i>Company Code</i>	CABB
<i>Business Area</i>	None
<i>Personnel Area</i>	CABB
<i>Personnel Subarea</i>	0002

- a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Expert Mode* → *Position*.
- b) Confirm that the plan version is *Current Plan* and validity period is *01.01* of the current year to *12.31.9999*. In the *Position* field, find **## Head of Personnel Development**. Select *Input Help* and in the *Search Term* field, enter **## Head*** and choose *Start Search*. Choose **## Head of Personnel Development** and then choose *Copy*. Press ENTER.
- c) In the *Position* field, use input help to find **## Head of Personnel Development**. Choose *Input Help* and in the *Search Term* field, enter **## Head*** and choose *Start Search*. From the list of the entries displayed, choose **## Head of Personnel Development** and choose *Copy*. On the *Maintain Position* screen, press ENTER.
- d) When the position and its infotypes are displayed, select the *Acct Assignment Features* infotype and choose the *Create* pushbutton.
- e) On the *Acct Assignment Features* screen, enter the following data:

Field Name	Value
<i>Company Code</i>	CABB
<i>Business Area</i>	None
<i>Personnel Area</i>	CABB
<i>Pers. Subarea</i>	0002

- f) Press ENTER and return to the *SAP Easy Access* screen.

5. Review the changes you have made in the *Organization and Staffing* interface. Identify the changes that are not displayed here.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *Organization and Staffing* → *Display*.
 - b) On the *Organization and Staffing Display* screen, search the position **## Head of Personnel Development** by using the *Search Term* option and double-click **## Head of Personnel Development** from the *Hit list* column.
 - c) Switch to the *Task Assignment* view in the overview area to display the work center and its relationship to the **## Head of Personnel Development**. The work center is displayed when you expand the tree structure. You can see most of the data you maintained in expert mode in *Staff Assignments (Structure)* on the respective tab pages:

Tab page	Data from the Infotype	Fields
<i>Account assignment</i>	<i>Account assignment</i>	<i>Company Code, Personnel area, and Pers. subarea</i>
<i>Work schedule</i>	<i>Employee group/subgroup</i>	<i>Employee group, Employee subgroup</i>

You will not be able to find the *Planned Compensation* infotype on the *Organization and Staffing* user interface.



Hint:

You can check infotype maintenance in the *Task Assignment* view.

In the *Find By* section of the *Object Manager*, enter **## Manager** and choose *Find*. Double-click the job **## Manager** to select it from the *Hit List* column. From the menu bar, choose *Goto* → *Detail object* → *Enhanced object description* to call *Single Maintenance* and check the *Planned Compensation* infotype.

- d) Return to the *SAP Easy Access* screen.

Task 3: Create and Test an Organizational Management Action

When new positions are created you want to ensure that all the appropriate organizational management infotypes are associated with the new position. This data should default onto the PA infotypes when hiring into one of these positions. You will require new positions be created using an Organizational Management Action

These mandatory infotypes include the Object Infotype, The Relationship Infotype with relationships to the Organizational Unit, Cost Center, and Job.

Upon hiring on the PA side, a default rate of pay should be presented. The default values for Personnel Area, Personnel Subarea, Employee Group, and Employee Subgroup should also default onto the Organizational Assignment Infotype (0001). Your new action is valid for all Plan Statuses.

1. Create the Organizational Management Action.

- a) From the *SAP Easy Access* screen, choose *Tools > Customizing > IMG > Execute Project > SAP Reference IMG*.
- b) In *Customizing* choose, *Personnel Management > Organizational Management > Basic Settings > Maintain Personnel Actions*. Choose this *IMG Activity*.
- c) Choose *New entries* and enter the action **##S** and Text **Group ## Position Creation Action** and choose *Save*. Acknowledge any warning messages about the name range.
- d) Select your Action and in the *Dialog Structure* choose the activity *Actions (Individual Maintenance)*. Choose *New Entries* and enter the data from the table. Feel free to add any other infotypes of your choosing.

**Note:**

There may be infotypes which you do not explicitly define in this step which appear when you run your action. This is because of the *Required Relationships* entry in the *Create Objects* step in *Customizing*. It is not necessary to enter a relationship for the position to an organizational unit.

- e) Create the entries provided in the table:

Act.	Action Text	SNo	Plan	Obj.T Y	In-fotpe	Sub.	Plan Statl	Variation Field	Func Code	Func Var
##S		10	**	S	1000				INSE	
##S		20	**	S	1001	A011		K	INSE	
##S		30	**	S	1001	B007		C	INSE	
##S		40	**	S	1005				INSE	
##S		50	**	S	1008				INSE	
##S		60	**	S	1013				INSE	

2. Test your newly created Action.

- a) In another session go to transaction **PP03** or from the *SAP Easy Access* screen choose *Human Resources > Organizational Management > Tools > Object > Actions*.
- b) In the *Plan Version* enter **01** for the *object type* choose **S**. Leave the *object ID* and *Object abbr.* fields blank. In the *Selection of tasks* choose the *Planning status 1*, choose today as the validity period to 12/31/9999 and enter your action **S##**. *Execute* the action.
- c) On the *Create Object (IT1000)* enter the *Object Abbr* **## Acnt Dir** and in the *Object Name* enter **## Accounting Director**. *Save*.
- d) On the *Essential Relationships (1001)* infotype put your cursor in the *field ID of related object*. Search for **## AC***. If presented with a list choose the Organizational unit **## Accounting**. The rest of the fields necessary are already populated with appropriate values. *Save* the infotype.

- e) On the *Create Relationships* Infotype with the *Relationship type/relationship A 011* for the type of related object *Cost Center* enter **4711** in the *ID of related object* field and Save. Save on the next screen as well that stores the relationship to the CO Area.
 - f) On the *Create Relationships* infotype with the *Relationship type/relationship B 007* for the type of related object *Job* enter **50 dir*** in the *ID of related object* field and Save. This will create a relationship from the position to the describing job 50 director.
 - g) On the *Create Planned Compensation* infotype, choose the *Pay Scale* tab. Enter *country grouping 99 – other countries*, *P. Scale type 90*, *PS Area 50*, *ESG for CAP 3*, *Pay Scale Group E06* and *PS Level 02*. Choose *Enter* and *Save* the Infotype.
 - h) On the *Create Acct. Assignment Features* infotype, enter *Company Code CABB*, *Personnel Area CABB* and *Pers. Subarea 0004*. Save the infotype.
 - i) On the *Create Employee Group/subgroup* infotype, enter *Employee Group 1* Active and *EE Subgroup X0 – salaried*. Save the Infotype.
 - j) Upon saving, the *Maintain Plan Data: Execute Actions* screen appears. Write down the *Object ID* that was generated. You will need it to test your defaults in the next task..
3. Test your defaults by hiring someone into the position. You should see the Cost Center, Organizational Unit, describing job, Personnel Area, PSA, EG and ESG default on IT0001 and you should see the default rate of pay appear on IT0008, Basic Pay.
- a) In the *Command* field enter transaction code **PA40** or from the *SAP Easy Access* screen choose *Human Resources > Personnel Management > Administration> HR Master Data > Personnel Actions*. Enter the *Personnel number 505999##* and **today's date** in the *From* field. Choose the action *Hiring HR505* and choose *Execute*.
 - b) On the *Create Actions* infotype, enter your position number that you just created in the *Position* field. Choose *Enter*. You should receive a message that *Default Values are used by the Position*. Acknowledge the message and verify that the personnel area, Employee group and Employee subgroup are filled with the values you assigned during the Organizational Management Position creation action. Save the infotype.
 - c) On the *Personal Data* infotype, enter a **Last Name, First Name**, and **birth date** of your choice and Save the infotype.
 - d) On the *Organizational Assignment* infotype verify that your cost center and subarea fields are populated as well as the correct describing job and Organizational unit. Save the Infotype.
 - e) On the *Address* infotype, leave the country as **Germany** and enter any **City** in the *City* field and Save the infotype.
 - f) On the *Planned Working time* infotype, view the defaults for *Work Schedule Rule Norm* and *Time Management Status of No Time Evaluation*. These are PA defaults configured by the PA team. Accept the defaults and Save the infotype.
 - g) On the *Basic Pay* infotype your default rate of pay should already appear as specified in your *Position Creation Action*. Save the infotype.
 - h) On the *Communication* infotype, cancel out of this infotype. It is not necessary for our test.

Set Up an Organizational Structure Using Simple Maintenance


Business Example

You want to maintain your organizational plan in the SAP system.

Maintain an organizational plan.



Note:

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.



Hint:

You can re-access *Simple Maintenance* with an editing period of 01. May of the current year to 31. December of the current year to simplify this exercise.

1. Move your *## Head of Personnel Development* from the *## Personnel Development* organizational unit to the *## Human Resources* organizational unit with effect from 01. May of the current year. Rename this position *## HR Manager* with effect from the same date.
2. In the *## Personnel Administration* organizational unit, create a new position (**##-HR Controller**) with effect from 01 May of the current year. Create a new job, **##-Controller**. Assign a holder (Donna Moore, personnel number 050995##, already in system) to this position.
3. Create two other new positions of your choice in the organizational unit *## Human Resources*.
4. Flag your *## HR Manager* as the chief position (if this has not yet been done).
5. Assign the *## Admin Personnel Administration* to the same cost center as the *## Human Resources* organizational unit.

Set Up an Organizational Structure Using Simple Maintenance


Business Example

You want to maintain your organizational plan in the SAP system.

Maintain an organizational plan.



Note:

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.



Hint:

You can re-access *Simple Maintenance* with an editing period of 01. May of the current year to 31. December of the current year to simplify this exercise.

1. Move your *## Head of Personnel Development* from the *## Personnel Development* organizational unit to the *## Human Resources* organizational unit with effect from 01. May of the current year. Rename this position *## HR Manager* with effect from the same date.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Organizational Management* → *Expert Mode* → *Simple Maintenance* → *Change*.
 - b) On the *Organization Plan / Change* screen, enter the object ID of your higher-level organizational unit and the correct editing period of 01 May of the current year. Choose *Search Help* and in the *Search Term* field, enter *## Human** and choose *Start Search*.
Choose *## Human Resources* (the one created 01.01 of the current year) and choose *Copy*. On the *Organizational Plan / Change* screen, press ENTER.
 - c) Choose the *Staff Assignments* pushbutton to access positions from the organizational structure.
 - d) Choose *## Human Resources* → *## Personnel Development* → *## Personnel Development Manager*.
 - e) Right-click *## Head of Personnel Development* and choose *Move*.
 - f) Double-click *## Human Resources Administration* organizational unit. The *Reassign* dialog box is displayed

g) Choose the *Period* pushbutton. In the *Validity period* dialog box, confirm 01 May as the validity period and choose *Continue*. In the *Reassign* dialog box, choose the *Reassign* pushbutton.

h) To rename the **## Head of Personnel Development** position, select the object.

i) Select *Edit > Change > Rename*. Overwrite the text with the data in the table as of 01 May.

Field	Value
<i>Object abbr.</i>	##-HR Mgr
<i>Object name</i>	##-HR Manager

j) Save your entries.

2. In the **## Personnel Administration** organizational unit, create a new position (**##-HR Controller**) with effect from 01 May of the current year. Create a new job, **##-Controller**. Assign a holder (Donna Moore, personnel number 050995##, already in system) to this position.

a) On the *Staff Assignments / Change* screen, choose **## Human Resources Administration**. Choose **## Personnel Administration** organizational unit. Choose the *Create Positions* pushbutton.

In the *Position* section of the *Create Positions* dialog box, in the *Abbr.* field, enter **## HR Cont** and in the *Name* field, enter **## HR Controller**.

In the validity of positions field, enter a start data of **01 May** of the current year.

b) In the *Create Positions* dialog box, choose the *Create jobs* pushbutton.

c) Enter the abbreviation and name of your new job (in this case **##-Controller**). Save your entries.

d) Enter **Controller Human resources** as the long description. Save your entries. The *Create Positions* dialog box is displayed. Choose *Save*.

e) Select the position and choose the *Assign Holder* pushbutton (on the application toolbar). In the *Name* field, enter the personnel number **50995##** in the dialog box. Ensure the validity period is correct. Choose *Save* and enter past the warning.

3. Create two other new positions of your choice in the organizational unit **## Human Resources**.

a) In *Staff Assignments*, select your **## Human Resources Administration** organizational unit and then choose the *Create Positions* pushbutton. Enter a name and abbreviation of your choice.

b) Save your entries.

4. Flag your **## HR Manager** as the chief position (if this has not yet been done).

a) Select **## HR Manager**.

b) In the menu, choose *Edit → Chief Position → Create*.

c) Check that the validity period in the dialog box is correct.

d) Save your entries.

5. Assign the *## Admin Personnel Administration* to the same cost center as the *## Human Resources* organizational unit.
 - a) Select the organizational unit *## Human Resources Administration* and in the menu bar, choose *Goto → Account assignment*.
 - b) Select the *## Admin Personnel Administration* position and choose the *Master Cost Center* pushbutton to create a cost center assignment.
 - c) In the *Cost Center* field, enter **4711** and to check the validity period in the dialog box, choose the *Check* pushbutton. After checking the data, save your entries and return to the *SAP Easy Access* screen.

Set Up the Organizational Structure Using the General Structures Interface

Business Example


You want to use the *General Structures* interface to depict a holding company within the organizational plan.

Create a legal entity relationship.



Note:

Use your group number (##) as a prefix to all of your object names and abbreviations (for example, 01-Organizational Unit, 01-Position). Use 01 June of the current year as the start date of your editing period.

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.

1. Create a legal entity (**##-Legal**) with effect from **01 June** of this year. Use the legal entity *Holding Training International* as your root organizational unit and evaluation path **B400**.
2. Link your **## Human Resources** organizational unit with your legal entity **##-Legal** as of **01 June** of this year. Use the evaluation path **A401**.
3. Display the structure of the legal entity (OR) *Holding Training International* using general structures. Use evaluation path **Z_OR-O**.

Set Up the Organizational Structure Using the General Structures Interface

Business Example


You want to use the *General Structures* interface to depict a holding company within the organizational plan.

Create a legal entity relationship.



Note:

Use your group number (##) as a prefix to all of your object names and abbreviations (for example, 01-Organizational Unit, 01-Position). Use 01 June of the current year as the start date of your editing period.

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.

1. Create a legal entity (**##-Legal1**) with effect from **01 June** of this year. Use the legal entity *Holding Training International* as your root organizational unit and evaluation path **B400**.
 - a) In the SAP Easy Access screen, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *General structures* → *Change*.
 - b) In the *Object Type* field, enter **OR**.
 - c) In the *Object ID* field, use the input help (F4) and choose *Holding Training International*.
 - d) In the *Evaluation Path* field, enter **B400**.
 - e) In the *Editing* field, enter **01 June** of the current year through **31 December 9999** as the validity period and choose *Enter*.
 - f) Once the structure is displayed, select *Holding Training International* and choose the *Create* pushbutton.
 - g) In the *Create Legal entity*, enter **##-LEG** in the *Abbr.* field and **##-Legal1** in the *Name* field.
 - h) Choose the *Period* pushbutton.
 - i) Check the validity period in the *Validity Period* dialog box and choose *Continue*.
 - j) Save your entries.
2. Link your **## Human Resources** organizational unit with your legal entity **##-Legal** as of **01 June** of this year. Use the evaluation path **A401**.

- a) On the *Structure B400: Change* screen, under *Legal entity*, expand *Holding Training International* and then choose *##-Legal*.
 - b) From the menu bar, choose *Go to* → *New evaluation path*.
 - c) In the *Evaluation Path* dialog box, enter **OR** in the *via* field and choose *Execute*. Then choose *A401* and choose *Transfer*.
 - d) Choose *##-Legal*. Choose *Edit* → *Create* → *Relationship* from the application toolbar.
 - e) In the *Choose relationship* dialog box, choose *Organizational unit* and then choose *Transfer*.
 - f) To search, in the *Organizational Unit Restrict Value Range* dialog box, enter **##*** in the *Search Term* field and choose *Start Search*. Choose *## Human Resources* and choose *Copy*.
 - g) In the *Choose restriction* dialog box, choose *Objects valid in a period* and choose *Continue*. Then choose the validity period.
 - h) In the *Assign Organizational units* dialog box, choose *## Human Resources*. Choose *Period*. In the *Validity period* dialog box, enter **01 June** of the current year to **31 December 9999** and choose *Continue*.
 - i) In the *Assign Organizational units* dialog box, choose *## Human Resources*. Save your entries and return to the *SAP Easy Access* screen.
3. Display the structure of the legal entity (OR) *Holding Training International* using general structures. Use evaluation path **z_OR-O**.
- a) In the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *General structures* → *Display*.
 - b) On the *Display Structure* screen, in the *Object Type* field, enter **OR**. Using input help, choose *Holding Training International* and choose *Copy*.
 - c) Enter **z_OR-O** in the *Evaluation Path* field and choose *Enter*.
 - d) Choose *Display* and you will see the entire structure.

Maintain Evaluation Paths


Business Example

You want to maintain an organizational plan by using the *General Structures* interface. For this, you need to add a new evaluation path.

Create a new evaluation path.



Note:

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.

1. Extend the evaluation path **Z_OR-O** to include the positions and their holders.
2. Select your new evaluation path from the table and choose Evaluation Path (Individual Maintenance).
3. Use your new evaluation path to view your legal entity structure **## Legal** in General Structure maintenance.

Maintain Evaluation Paths


Business Example

You want to maintain an organizational plan by using the *General Structures* interface. For this, you need to add a new evaluation path.

Create a new evaluation path.



Note:

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.

1. Extend the evaluation path **z_OR-O** to include the positions and their holders.
 - a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Maintain Evaluation Paths*.
 - b) On the *Change View "Evaluation Paths": Overview* screen, choose the *Position* pushbutton.
 - c) In the *Another entry* dialog box, enter **z_OR-O** in the *Evaluation Path* field and choose *Copy*.
 - d) From the *EvalPath* column, choose **Z_OR-O** and then choose the *Copy As* pushbutton.
 - e) In evaluation path, to include your group number, rename the evaluation path as **z_OR-O##** in the *EvalPath* column and press ENTER.
 - f) In the *Specify object to be copied* dialog box, choose the *Copy all* pushbutton. In the *Information* dialog box, choose *Continue*.
 - g) Save your entries and return to the table containing all the evaluation paths.
2. Select your new evaluation path from the table and choose *Evaluation Path (Individual Maintenance)*.
 - a) On the *Change View "Evaluation Paths": Overview* screen, choose the *Position* pushbutton.
 - b) In the *Another entry* dialog box, enter **z_OR-O##** in the *Evaluation Path* field.
 - c) Choose **z_OR-O##** from the *EvalPath* column.
 - d) Then choose *Evaluation path (individual maintenance)* from the *Dialog Structure*.
 - e) The details of your evaluation path are displayed. Choose the *New Entries* pushbutton, and enter the required information to add positions and holders to your evaluation path. HINT: Pay attention to the sequence numbers. You should set up new entries in

the chart below, to add lines 14 and 18, which are depicted in the chart below as the second and third lines. The other lines already exist from the copy process

Once you have done this, your evaluation path on the *New Entries: Overview of Add Entries* screen appears as follows:

Obj.Type	A/B	Relat'ship	Relat'ship	Rel.obj.type
OR	A	401	*	O
O	B	003	*	S
S	A	008	*	P
O	B	002	*	O
OR	B	400	*	OR

- f) Save your data and return to the *SAP Easy Access* screen.
3. Use your new evaluation path to view your legal entity structure **## Legal** in General Structure maintenance.
 - a) In the *SAP Easy Access* menu, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *General structures* → *Display*.
 - b) On the *Display Structure* screen, enter **OR** in the *Object Type* field.
 - c) In the *Object ID* field of the *Legal Entity* dialog box, choose *Holding Training International* from the input help and choose *Copy*.
 - d) Enter **z_OR-0##** in the *Evaluation Path* field. Press ENTER to display the structure.
View the structure for your **## Human Resources** by changing the object type to **O** and search for the object ID of **## Human Resources**.
 - e) Display the structure.

Create a Matrix Organization

Business Example


Project teams are formed at your company and the existing positions are assigned to the different project teams. Create a new matrix to depict the matrix structure.

Create an implementation team by using the *Matrix Organization* interface.



Note:

Use your group number (##) as a prefix to all of your object names and abbreviations (for example, 01-Organizational Unit, 01-Position). Use 01 September of the current year as the start date of your editing period.

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.

1. Use the *General Structures* interface to display the structure of System Implementations / Teams (**object type 99**) by using the evaluation path ZB99.
2. Create a new matrix to display your structure. In dimension 1, display the implementation structure. Use *System Implementations/Teams* as the root and **ZB99** as the evaluation path.
In dimension 2, display the positions in your organizational unit ## *Human Resources* on the *Matrix Organization* interface. Use **PLSTE** as the evaluation path.
Create a matrix with the relationship **BY99** with the start date as 01 September of the current year.
3. Assign your ## *HR Manager* and the ## *HR Controller* positions to implementation team 1.

Create a Matrix Organization

Business Example


Project teams are formed at your company and the existing positions are assigned to the different project teams. Create a new matrix to depict the matrix structure.

Create an implementation team by using the *Matrix Organization* interface.



Note:

Use your group number (##) as a prefix to all of your object names and abbreviations (for example, 01-Organizational Unit, 01-Position). Use 01 September of the current year as the start date of your editing period.

Choose  (SAP Menu) on the SAP Easy Access screen before you start the exercise.

1. Use the *General Structures* interface to display the structure of System Implementations / Teams (**object type 99**) by using the evaluation path ZB99.
 - a) In the SAP Easy Access screen, choose *Human Resources → Organizational Management → Organizational Plan → General structures → Display*.
 - b) On the *Display Structure* screen, enter **Object type 99**.
 - c) In the *Object ID* field, enter **50028397**.
 - d) Use evaluation path ZB99.
 - e) Press ENTER to display the structure.
 - f) Return to the SAP Easy Access screen.
2. Create a new matrix to display your structure. In dimension 1, display the implementation structure. Use *System Implementations/Teams* as the root and **ZB99** as the evaluation path.
In dimension 2, display the positions in your organizational unit ## *Human Resources* on the *Matrix Organization* interface. Use **PLSTE** as the evaluation path.
Create a matrix with the relationship **BY99** with the start date as 01 September of the current year.
 - a) In the SAP Easy Access screen, choose *Human Resources → Organizational Management → Organizational Plan → Matrix → Change*.
 - b) In the *Access Matrix Organization* dialog box, select the *Standard selection* radio button and choose *Continue*. Hint: Matrix variants can be created in the IMG. After testing with the standard selection scenario, choose Matrix type rather than standard selection. Use variant ZTEAMS. All that needs to be entered is the organizational unit

ID, the implementation team ID and select Matrix view. You'll notice that the dimensions have changed axis from the standard selection

- c) In the *Dimension 1* pane, enter the following data:

Field	Value
<i>Object type</i>	99
<i>Object ID</i>	50028397 (the system text appears as <i>System Implementations/Team</i> after you press ENTER)
<i>Evaluation Path</i>	ZB99

- d) In the *Dimension 2* pane, enter the following data:

Field	Value
<i>Object type</i>	0
<i>Object ID</i>	## Human Resources (use F4 help)
<i>Evaluation Path</i>	PLSTE

- e) In the *Relationship between dimensions* pane, enter the following data:

Field	Value
<i>Relationship type/relationship</i>	B
<i>Relationship object</i>	Y99

- f) In the *Validity period* pane, enter the following data:

Field	Value
<i>Start date</i>	01 September of the current year
<i>End Date</i>	31 December 9999

- g) In the *View* pane, select the *Matrix view* radio button.

- h) Choose *Execute*.



Note:
Remain on the same screen for the next step.

3. Assign your **## HR Manager** and the **## HR Controller** positions to implementation team 1.

- Select the box between your **## HR Manager** position and implementation *Team 1*.
- In the *Create Relationship* dialog box, check the validity period and confirm the data by choosing *Create*.
- Select the box between your **## HR Controller** position and Implementation *Team 1*.

- d) In the *Create Relationship* dialog box, check the validity period and confirm the data by choosing *Create*.



Note:

If all the positions are not displayed, use the *Next column* or *Last column* icons. Alternatively, you could select the Invert Dimensions icon.

- e) Return to the *SAP Easy Access* screen.

Hire an employee and test the integration between OM and PA


Business Example

Your company is implementing PA and OM. This will streamline the process of hiring new employees to fill your vacant positions. You need to know the various tools you can use to ensure data consistency between the two components.

Task 1: Hire a new employee and set up integration.

1. Use the personnel action *Hiring HR505* to hire an employee for the position ## *Head of Personnel Development*. Enter a name of your choice as the name of the employee and start date as today's date. Assign the personnel number **505992##**. Fill all other infotypes with data of your choice.



Note:
Choose  (SAP Menu) before you start this exercise.

2. Which fields in the *Actions* and *Organizational Assignment* infotypes already contain information you entered in OM?
3. Which Customizing activities must be completed to activate integration between OM and PA?

Task 2: Use Integration Tools Part 1

Business Example:

Your company wants to take advantage of the drag and drop capability for person/position assignment available in the Organization and Staffing interface (transaction PPOME). When mass changes are made, you need to ensure that a batch input session is created.

1. Assign personnel number 50992## (Julie Lehman) to a position using Drag and Drop in the Organization and Staffing Interface.
2. Update the new positions assignments for employees using batch input.
3. Verify the completion of the new position for your employee.

Task 3: Use Integration Tools Part 2

Business Example:

Your company wants to take advantage of the drag and drop capability for person/position assignment available in the Organization and Staffing interface (transaction PPOME). It is

required that any new assignment is also captured in both infotypes 0000 (*Personnel Actions*) and 0001 (*Organizational Assignment*).

1. Assign personnel number 50991## (Helena Camino) to a position using Drag and Drop in the *Organization and Staffing* interface.
2. View the lock in table *T77INT*.
3. Unlock your employee by executing report RPLEVENT.

Hire an employee and test the integration between OM and PA

Business Example

Your company is implementing PA and OM. This will streamline the process of hiring new employees to fill your vacant positions. You need to know the various tools you can use to ensure data consistency between the two components.

Task 1: Hire a new employee and set up integration.

1. Use the personnel action *Hiring HR505* to hire an employee for the position **## Head of Personnel Development**. Enter a name of your choice as the name of the employee and start date as today's date. Assign the personnel number **505992##**. Fill all other infotypes with data of your choice.



Note:

Choose  (SAP Menu) before you start this exercise.

- a) On the *SAP Easy Access* screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.
- b) In the *Personnel no.* field, enter personnel number **505992##** and in the *From* field, enter today's date as the start date. Choose the personnel action *Hiring HR505* and choose *Execute*.
- c) Assign the new employee to the **## Head of Personnel Development** position. Choose input help, and in the *Search Term* field, enter **## Head***, and choose *Start Search*. From the list of positions displayed, select **## Head of Personnel Development** position and choose *Copy*.
- d) Choose *ENTER*. An information dialog box confirms default values are used by the position. Choose *Continue*. You can see the following information from the position:

Field	Value
<i>Personnel Area</i>	<i>CABB</i>
<i>EE Group</i>	<i>1</i>
<i>EE Subgroup</i>	<i>X0</i>



Note:

The higher-level organizational unit **## Human Resources** inherits the personnel area from the *Account Assignment Features* infotype. You maintained the information for the *Employee Group/ Subgroup* infotype for the position **## Head of Personnel Development**.

- e) Choose **Save**. You are automatically taken to the next infotype, until you have entered the necessary data for all infotypes.
- f) For the *Personal Data* infotype, on the *Create Personal Data (0002)* screen, enter **your first name, last name, any date of birth, and marital status**. Choose **Save**.



Note:

For *Organizational Assignment* infotype, observe the fields that are already filled with information from OM. The information originates from the *Account Assignment features* infotype for organizational unit **## Human Resources**, the *Cost Center Relationship*, the relationships from P to S, S to O, and S to C in the *Organizational Plan* area.

- g) Choose **Save**. The *Delimit Vacancy* dialog box is displayed. Accept the values by choosing **Yes**.



Note:

You may or may not receive the dialog box for the vacancy. The display of the dialog box is dependent on the settings for your position in the Organization and Staffing Interface (PPOME) or infotype maintenance.

- h) Enter **an address of your choice** and choose **Save**. The *Planned Working Time* infotype is displayed. Accept the default values by pressing **Enter** and choose **Save**.
 - i) For the *Basic Pay* infotype, the system proposes the values that you have defined for the job **## Manager** in infotype 1005 *Planned Compensation*. Accept the default values by pressing **Enter** and choose **Save**.
 - j) In the System ID field of the Communication infotype, enter **HR505-##**, press **Enter**, and choose **Save**.
 - k) Return to the *SAP Easy Access* screen.
2. Which fields in the *Actions* and *Organizational Assignment* infotypes already contain information you entered in OM?
 - a) Actions: Personnel area, employee group, employee subgroup
 - b) Organizational Assignment: Cost center, personnel subarea, job, organizational unit
 3. Which Customizing activities must be completed to activate integration between OM and PA?

- a) The Customizing activities required to activate integration between OM and PA are located under the following path:
 - In Customizing, choose *SAP Reference IMG* → *Personnel Management* → *Organizational Management* → *Integration* → *Set Up Integration with Personnel Administration*.

Task 2: Use Integration Tools Part 1

Business Example:

Your company wants to take advantage of the drag and drop capability for person/position assignment available in the Organization and Staffing interface (transaction PPOME). When mass changes are made, you need to ensure that a batch input session is created.

1. Assign personnel number 50992## (Julie Lehman) to a position using Drag and Drop in the Organization and Staffing Interface.
 - a) Navigate to **PPOME**: From the *SAP Easy Access* screen, choose *Human Resources* -> *Organizational Management* -> *Organizational Plan* -> *Organization and Staffing* -> *Change*.
 - b) In the *Find by* section, search for your ## Payroll Organizational Unit.
 - c) Double-click your ## Payroll Organizational Unit when it displays in the hit list. Hint: If more than one appears, yours will have a chief position.
Your organizational unit should now be displayed in the *Overview* area of the screen.
 - d) In the *Find by* section, open the folder *Persons* and choose *Search term*.
 - e) Enter **50992##** in the *With name* field and choose *Find*.
 - f) Choose Julie Lehman from the hit list, and drag her into the ## *Payroll Clerk Position* in the *Overview* area.
 - g) In the *Person Assignment* box, select the action reason **Promotion** and choose *Continue*.
 - h) Choose *Save* to complete the transaction. Delimit the vacancy by choosing *Continue* and choose *Save*.
 - i) Return to the *SAP Easy Access* screen and navigate to transaction **PA30**.
 - j) Enter **50992##** in the personnel number field and choose *Enter*.
 - k) Select the *Organizational Assignment* infotype and then choose *Display*.
 - l) Verify the new assignment has not yet been created.
 - m) Return to the *SAP Easy Access* screen by choosing the *Back* pushbutton.
2. Update the new positions assignments for employees using batch input.
 - a) From the *SAP Easy Access* screen, enter transaction code **SA38** in the *Command* field.
 - b) In the *ABAP editor* screen, enter **RHINTE30** in the program field and *Execute*.
 - c) Select the radio button for the *current month*, enter personnel number **50992##** and *Execute*.

- d) Verify your employee appears in the list then return to the main screen and remove the *test indicator*.
 - e) Execute again and note the successful creation of a batch input session.
 - f) Return to the *SAP Easy Access* screen.
 - g) Enter transaction code **SM35** in the *Command* field to access batch input.
 - h) Select the batch input session you created for program *RHINTE30* and choose *Process*.
 - i) In the process sessions dialog box, Select *Display errors only* and then *process*.
 - j) Acknowledge the message that the batch input session has been completed by choosing *Exit batch input*.
3. Verify the completion of the new position for your employee.
- a) From the *SAP Easy Access* screen, enter transaction code **PA30** in the *Command* field.
 - b) Enter **50992##** in the *Personnel number* field.
 - c) Select the *Organizational Assignment* infotype and the *All* radio button for period selection.
 - d) Use the *Overview* icon to view the records as a list.
 - e) Verify the new assignment has now been created.
 - f) Return to the *SAP Easy Access* screen by choosing the *Back* pushbutton.

Task 3: Use Integration Tools Part 2

Business Example:

Your company wants to take advantage of the drag and drop capability for person/position assignment available in the Organization and Staffing interface (transaction *PPOME*). It is required that any new assignment is also captured in both infotypes *0000 (Personnel Actions)* and *0001 (Organizational Assignment)*.

1. Assign personnel number 50991## (Helena Camino) to a position using Drag and Drop in the *Organization and Staffing* interface.
 - a) Navigate to *PPOME*: From the *SAP Easy Access* screen, choose *Human Resources -> Organizational Management -> Organizational Plan -> Organization and Staffing -> Change*.
 - b) In the *Find by* section, search for your **##** Payroll Organizational Unit. Double-click it when it displays in the hit list. Hint: If more than one appears, yours will have a chief position. Your organizational unit should now be displayed in the *Overview* area of the screen.
 - c) In the *Find by* section, open the folder *Persons* and choose *Search term*. Enter **50991##** in the *With name* field and choose *Find*.
 - d) Choose Helena Camino from your hit list, and drag her into the **##** Payroll Manager position in the *Overview* area.

- e) In the *Person assignment* box, select the action reason promotion and choose *Continue*.
 - f) Choose *Save* to complete the assignment.
 - g) Return to the *SAP Easy Access* screen and navigate to transaction `PA30`. Enter **50991##** in the *Personnel number* field.
 - h) Select the *Organizational Assignment* infotype and then choose *Change*. You should receive a message indicating a prebooking exists for your employee.
 - i) Return to the *SAP Easy Access* screen by choosing the *Back* pushbutton.
2. View the lock in table *T77INT*.
- a) From the *SAP Easy Access* screen, enter transaction code **SE16** in the *Command* field to access the data browser.
 - b) Enter **T77INT** in the table name field and choose the *Table Contents* icon. Hint: To use regular field labels and not the technical names choose *Settings -> User Parameters*. Select the box for field labels and choose *continue*.
 - c) Enter personnel number **50991##** and choose *Execute*.
 - d) Verify the Action Type and Reason are the ones you selected: *Change of Position (02)* and *Promotion (03)*.
 - e) Return to the *SAP Easy Access* screen by choosing the *Back* pushbutton.
3. Unlock your employee by executing report *RPLEVENT*.
- a) From the *SAP Easy Access* screen, enter transaction code **SA38** in the *Command* field to access the *ABAP editor*.
 - b) Enter **RPLEVENT** in the program field and *Execute*.
 - c) Enter personnel number **50991##** and *Execute*.
 - d) Select your employee and choose *Continue*.
 - e) Select *Create Action*.
 - f) Save infotype *0000 Actions* and press *Enter* to acknowledge any delimit messages.
 - g) Save infotype *0001 Organizational Assignment* and press *Enter* to acknowledge any delimit messages.
 - h) Choose *Continue* to acknowledge that the flag for your personnel number has been removed.
 - i) Save infotype *0007 Planned Working Time* and infotype *0008 Basic Pay*.
 - j) It is not necessary to save infotype *0041 Date Specifications*. Choose *Exit* to leave the action and return to the initial *RPLEVENT* screen.

Update Organizational Changes Using Manager's Desktop (MDT)

Business Example

As a manager, you need to change the attributes of certain positions within your area of responsibility. You also need to report on the organizational units under your charge.



Note:

To use MDT, you must have assigned your user ID (HR505-##) to the person you hired in the *Communication* infotype (subtype 0001) in the previous unit.

Make organizational changes by using MDT.



Note:

Choose  (SAP Menu) before you start this exercise.

1. Rename your ## - HR Controller position as ## - Personnel Cost Planner / Controller. The new name is to be effective as of 01 December of the current year. Use the *Change of Position HR505* action to do this.
2. Enter a description for your new position.
3. Identify the unoccupied positions in your *Human Resources* organizational unit and all subordinate organizational units.

Update Organizational Changes Using Manager's Desktop (MDT)

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Note:

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Make organizational changes by using MDT.



Note:

Choose  (SAP Menu) before you start this exercise.

1. Rename your ## - HR Controller position as ## - Personnel Cost Planner / Controller. The new name is to be effective as of 01 December of the current year. Use the *Change of Position HR505* action to do this.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Manager's Desktop*.
 - b) On the *Manager's Desktop* screen, choose the *Organization* pushbutton. The system displays the organizational unit for which the person you hired is responsible.
 - c) Select the calendar icon and change the date to 01 December of the current year.
 - d) On the *Manager's Desktop: Organization* screen, choose the *All subordinate employees* tab page and then choose the ##-HR Controller position.
 - e) To expand the *Selected function* list, choose *Organization* → *Planning + Administration* → *Change Position*.
 - f) In the *Change position data* dialog box, enter **## - Personnel Cost Planner / Controller** in the *Name* field and **## PCP/Cont** in the *Abbreviation* field.
2. Enter a description for your new position.
 - a) Enter a general description of your choice for the position.
 - b) Save your entries. Hint: To view this update, click the date icon and enter 12/01/YYYY and continue.

**Hint:**

You can use drag and drop to move the position *##-Human Resources Controller* to the *Change Position* entry in the function list. You can then make the necessary changes.

3. Identify the unoccupied positions in your *Human Resources* organizational unit and all subordinate organizational units.
 - a) On the *All subordinate employees* tab page, choose the *## Human Resources Administration* organizational unit.
 - b) Choose *Organization* → *Planning + Administration* → *Unoccupied Positions* from the function list.

Change the Appearance of Manager's Desktop (MDT)

Business Example

To discharge your administrative responsibilities in the SAP environment, you need to configure the screen layout and enhance the range of functions in MDT.

Change the appearance of MDT.



Note:

Choose  (SAP Menu) before you start the exercise.

1. Hide the *Transfer Outside* function in the *Organization* category.

Change the Appearance of Manager's Desktop (MDT)

Business Example

To discharge your administrative responsibilities in the SAP environment, you need to configure the screen layout and enhance the range of functions in MDT.

Change the appearance of MDT.



Note:

Choose  (SAP Menu) before you start the exercise.

1. Hide the *Transfer Outside* function in the *Organization* category.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Manager's Desktop*.
 - b) On the *Manager's Desktop* screen, choose *Settings* → *Functions* → *User settings*.
 - c) In the *Manager's Desktop: Function selection* dialog box, deselect *Transfer Outside* (the object you want to hide) and then choose *Continue*.
 - d) Confirm this by pressing ENTER.
 - e) Check the change by choosing *Organization*. In the *Selected Functions* area, choose *Organization* → *Planning + Administration*. The function *Transfer Outside* is no longer displayed.
 - f) Return to the *SAP Easy Access* screen.

Unit 8

Exercise 14


Update Position Information Using SAP NetWeaver Business Client (NWBC)

Business Example

You want to change the title of a position and add an essential job requirement to a position. You therefore need to update position information by using SAP NetWeaver Business Client (NWBC). For this exercise, you will reassign your user ID to Winnie Chung personnel number 540991##.

Change the title of a position **## Plant Supervisor** to **## Plant Manager** and add an essential job requirement of HR management skills with a proficiency level of expert.



Note:
Choose  (SAP Menu) before you start the exercise.

1. Delete the Communication infotype 0105 for employee 505992##.
2. Delete the Communication infotype for Winnie Chung personnel number 540991##.
3. Update *Communication* infotype **0105** with subtype **0001** for the employee Winnie Chung, personnel number 540991## to reflect your user ID HR505-## effective 01 January of the current year.
4. Access MSS by using NWBC.
5. Access the positions for your organizational unit.
6. Change the name of the position **## Plant Supervisor**.
7. Add the new position requirement First Aider Training with a proficiency of expert to your new **## Plant Manager Resources** position. This requirement should be essential.
8. To complete the update, proceed as follows.
9. Verify your update from the overview screen and return to the *SAP Easy Access screen*.

Update Position Information Using SAP NetWeaver Business Client (NWBC)

Business Example

You want to change the title of a position and add an essential job requirement to a position. You therefore need to update position information by using SAP NetWeaver Business Client (NWBC). For this exercise, you will reassign your user ID to Winnie Chung personnel number 540991##.

Change the title of a position **## Plant Supervisor** to **## Plant Manager** and add an essential job requirement of HR management skills with a proficiency level of expert.



Note:

Choose  (SAP Menu) before you start the exercise.

1. Delete the Communication infotype 0105 for employee 505992##.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.
 - b) In the *Personnel no.* field, enter **505992##** and press *Enter*.
 - c) In the *Direct selection* screen area, enter **0105** in the *infotype* field and **0001** in the *STy* field.
 - d) Choose *Enter*.
 - e) Choose the *Delete* pushbutton.
 - f) Confirm the deletion of the infotype and Save your entry.
2. Delete the Communication infotype for Winnie Chung personnel number 540991##.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.
 - b) In the *Personnel no.* field, enter **540991##** and press *Enter*.
 - c) In the *Direct selection* screen area, enter **0105** in the *infotype* field and **0001** in the *STy* field.
 - d) Choose *Enter*.
 - e) Choose the *Delete* pushbutton.
 - f) Confirm the deletion of the infotype and Save your entry.
3. Update *Communication* infotype **0105** with subtype **0001** for the employee Winnie Chung, personnel number 540991## to reflect your user ID HR505-## effective 01 January of the current year.

- a) On the *SAP Easy Access* screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.
- a) On the *Maintain HR Master Data* screen, in the *Personnel no.* field, enter **540991##** and press *Enter*.
- b) In the *Direct selection* screen area, enter **0105** in the *infotype* field and **0001** in the *STy* field.
- c) Choose *Enter*.
- d) Choose the *Create* pushbutton.
- e) On the *Create Communication (0105)* screen, in the *Start* field, enter 01 January of the current year.
- f) In the *System ID* field, enter your user ID **HR505-##** (## = your group number).
- g) Save your entries.
- h) Return to the *SAP Easy Access* screen.
4. Access MSS by using NWBC.
 - a) Enter the transaction **NWBC** in the *Command* field and choose *Continue*.
 - b) On the *Launch NetWeaver Business Client* screen, select the role **SAP_MANAGER_MSS_NWBC**.
5. Access the positions for your organizational unit.
 - a) On the *SAP Business Client* screen, from the left column, choose *Organization* → *Services* → *Edit Position Details*.
6. Change the name of the position **## Plant Supervisor**.
 - a) On the *Details: Step 1 (Select Position)* screen, choose the box where the position is **## Plant Supervisor**. Then, choose the *Edit Details* or *Next* pushbutton.
 - b) On the *Details: Step 2 (Edit Details)* screen, change in the *Position Title* field, change the name of the position to **## Plant Manager**.
7. Add the new position requirement First Aider Training with a proficiency of expert to your new **## Plant Manager Resources** position. This requirement should be essential.
 - a) Choose the *Add Requirement* pushbutton.
 - b) Open the Requirement Catalog by choosing *Business Knowledge, Skills and Abilities* → *Human Resources* → *Health & Safety Knowledge* -> *First Aider Training* and choose *Edit*.
 - c) Make your new proficiency essential by choosing the *Yes* button.
8. To complete the update, proceed as follows.
 - a) Return to the *Edit Position Details* screen by choosing the *Exit to Edit Details*.
 - b) Choose the *Finish* pushbutton and save your entries.
 - c) Exit the current screen.
9. Verify your update from the overview screen and return to the *SAP Easy Access* screen.

- a) From the left column, choose *Organization* → *Services* → *Edit Position Details*. Your position has been renamed.
- b) Exit the current screen.
- c) Choose *Log Off*.
- d) In the *Log Off* dialog box, choose the *OK* pushbutton.

Modify the Data Model

Business Example

In your organization, you have divided the employees into training groups. You want to promote the development of these groups using different personnel development measures. You also want to maintain and manage the groups in OM. For this reason, you need to know how to enhance the data model.


Add new object types to the object-oriented model in Personnel Planning.



Note:

As you complete the exercises, you may be required to set up a transport request and acknowledge the request when you save entries. To create a transport request, proceed as follows:

1. In the *Transport Request* dialog box, choose *Create Request*.
2. Enter **Group ##** as short description.
3. Save your entries and choose *Continue*. The request can be displayed when you save your entries.
4. Place the cursor on the request you just created and choose *Continue*.

You may be prompted to confirm your request when saving table entries. Use  (SAP Menu) on the *SAP Easy Access* screen. Do not use the user menu associated with your HR505 user ID.

1. Create a new object type with the object type abbreviation ## and the name ## **Training Group** (## is your two-digit group number).

Modify the Data Model

Business Example

In your organization, you have divided the employees into training groups. You want to promote the development of these groups using different personnel development measures. You also want to maintain and manage the groups in OM. For this reason, you need to know how to enhance the data model.


Add new object types to the object-oriented model in Personnel Planning.



Note:

As you complete the exercises, you may be required to set up a transport request and acknowledge the request when you save entries. To create a transport request, proceed as follows:

1. In the *Transport Request* dialog box, choose *Create Request*.
2. Enter **Group ##** as short description.
3. Save your entries and choose *Continue*. The request can be displayed when you save your entries.
4. Place the cursor on the request you just created and choose *Continue*.

You may be prompted to confirm your request when saving table entries. Use  (SAP Menu) on the *SAP Easy Access* screen. Do not use the user menu associated with your HR505 user ID.

1. Create a new object type with the object type abbreviation **##** and the name **## Training Group** (**##** is your two-digit group number).
 - a) On the *SAP Easy Access* screen, choose *Tools* → *Customizing* → *IMG* → *Execute Project* → *SAP Reference IMG*.
 - b) In *Customizing*, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Maintain Object Types*.
 - c) Choose the *New Entries* pushbutton to create a new object type with the *Object Type* **##** and the *Object type text* **## Training Group**.
 - d) In the *Icon Name* field, enter the name **ICON_PARTNER** to display the object type in the system.
 - e) Choose ENTER.
 - f) Save your entries.

Unit 9

Exercise 16

Create a Relationship

Business Example

In your organization, you have divided the employees into training groups. You want to promote the development of these groups by using different personnel development measures. You also want to maintain relationships and descriptions for the newly created objects. For this reason, you need to know how to create relationships.

Add relationships to the newly created object types in the object-oriented model for Personnel Planning.

1. Add your new object type to the infotypes 1000, 1001, and 1002. **##** is your two-digit group number.

Use the data provided in the following table:

Object Type	Infotype
##	1000
##	1001
##	1002

2. Create the *Object* infotype 1000 for your new training group containing your group number in the *Object abbr.* and the *Object name* fields by using *Expert Mode* (transaction code **PP01**).

Use the data provided in the following table:

Field Name or Data Type	Values
Object abbr.	TGRP ##
Object name	Training Group ##

3. Create a new relationship that tells you which person is assigned to which training group. Create a relationship with the abbreviation **Q##** and the name as indicated in the table. Also create a new relationship for your root training group, with the relationship of **R##** and the names as indicated in the table.



Note:

A person can only belong to one training group.

Create a relationship with the abbreviation **Q##** with a bottom up relationship **(A) Employee Belongs to ##** and a top down relationship **(B) TGRP Includes**. Create a relationship with the abbreviation **R##** with a bottom up relationship **(A) TGRP is the Child of** and a top down relationship **(B) TGRP is the Parent of**. This allows your

new **##** Training group to have subordinate training groups (Child) and be the Parent to subordinate training groups.

Use the data provided in the following table:

Relationship	Relationship bottom up	Relationship top down
Q##	(A) Employee Belongs to ##	(B) TGRP Includes
R##	(A) TGRP is the Child of	(B) TGRP is the Parent of

4. In the *Allowed Relationships* step, use the *Dialog Structure* to enter the two directions of your new relationship to and from the object type *Person*, as indicated in the table. Your object **##** requires a top down **Q##** relationship with the object type *Person*. The object *Person* requires a bottom up **Q##** relationship with your object **##**. This allows your training group to include the object *Person* and allows persons to be assigned to your training group.

In addition, your new object **##** requires a bottom up **R##** relationship with object type **##**, and your object **##** also requires a top down **R##** relationship with your object **##**. This allows your new **## Training group** to have subordinate training groups (Child) and be the *Parent* to subordinate training groups.

OT	Object type text	A/B	Rel	Relationship name	Rel Objtype	Not maint.
##	## Training Group	<i>B</i>	Q##	<i>TGRP includes</i>	<i>P</i>	
<i>P</i>	<i>Person</i>	<i>A</i>	Q##	<i>Employee Belongs to ##</i>	##	

OT	Object type text	A/B	Rel	Relationship name	Rel Objtype	Not maint.
##	## Training Group	<i>A</i>	R##	<i>(A) TGRP is the Child of</i>	##	
##	## Training Group	<i>B</i>	R##	<i>(B) TGRP is the Parent of</i>	##	

5. Create subtypes **AQ##** with the subtype text **Employee Belongs to TRGRP**, **BQ##** with the subtype text **TRGRP Includes**, **AR##** with the subtype text **Is the Child of**, and **BR##** with the subtype text **Is the Parent of**, for infotype 1001.

Use the data provided in the following table:

Infotype	Infotype Name	Subtype	Subtype text
1001	<i>Relationships</i>	AQ##	Employee Belongs to TRGRP

Infotype	Infotype Name	Subtype	Subtype text
1001	Relationships	BQ##	TGRP Includes These Empl
1001	Relationships	AR##	Is the Child of
1001	Relationships	BR##	Is the Parent of

6. Set up the relationships for your new object type to allow employees the option of belonging to a training group, and to allow your new object ## to be assigned multiple employees and be the parent of multiple subordinate training groups. The object type of Person can only belong to one training group at one time. A subordinate training group can only belong to one parent training group at one time

Use the data provided in the following table:

Field Name	Value	Description
Object type	P	Person
Infotype	1001	Relationships
Subtype	AQ##	Employee Belongs to TRGRP
Time constraint	2	
Addl. condition		

Field Name	Value	Description
Object type	##	## Training Group
Infotype	1001	Relationships
Subtype	BQ##	TGRP Includes These Empl
Time constraint	3	
Addl. condition		

Field Name	Value	Description
Object type	##	## Training Group
Infotype	1001	Relationships
Subtype	AR##	Is the Child of
Time constraint	2	
Addl. condition		

Field Name	Value	Description
Object type	##	## Training Group
Infotype	1001	Relationships
Subtype	BR##	Is the parent of

Field Name	Value	Description
<i>Time constraint</i>	3	
<i>Addl. condition</i>		

- For object type P, infotype 1001, and subtype AQ##, enter a time constraint of 2.
- For object type ##, infotype 1001, and subtype BQ##, enter a time constraint of 3.
- For object type ##, infotype 1001, and subtype AR##, enter a time constraint of 2.
- For object type ##, infotype 1001, and subtype BR##, enter a time constraint of 3.

Create a Relationship

Business Example

In your organization, you have divided the employees into training groups. You want to promote the development of these groups by using different personnel development measures. You also want to maintain relationships and descriptions for the newly created objects. For this reason, you need to know how to create relationships.

Add relationships to the newly created object types in the object-oriented model for Personnel Planning.

1. Add your new object type to the infotypes 1000, 1001, and 1002. ## is your two-digit group number.

Use the data provided in the following table:

Object Type	Infotype
##	1000
##	1001
##	1002

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Infotype Maintenance* → *Maintain Infotypes*.
 - b) Choose 1000 in the *Infotype* field and double-click *Infotypes per object type* in the *Dialog Structure* column.
 - c) Choose the *New Entries* pushbutton.
 - d) Enter object type **##** and infotype **1000**.
 - e) Save your entries and choose the *Back* pushbutton to return to the *Change View "Infotypes" Overview* screen.
 - f) Repeat this procedure for infotypes 1001 and 1002.
 - g) Remain in the IMG. Open a new session for the next steps by choosing the *Creates New Session* pushbutton.
2. Create the *Object* infotype 1000 for your new training group containing your group number in the *Object abbr.* and the *Object name* fields by using *Expert Mode* (transaction code PP01).

Use the data provided in the following table:

Field Name or Data Type	Values
Object abbr.	TGRP ##

Object name	Training Group ##
-------------	--------------------------

- a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Expert Mode* → *General*.
 - b) Choose **## Training Group** in the *Object Type* field.
 - c) Choose the *Object* infotype and verify the *Object ID* field is blank.
 - d) Choose the *Create Infotype* pushbutton.
 - e) Enter data from the table provided.
 - f) Save your entries.
3. Create a new relationship that tells you which person is assigned to which training group. Create a relationship with the abbreviation **Q##** and the name as indicated in the table. Also create a new relationship for your root training group, with the relationship of **R##** and the names as indicated in the table.



Note:

A person can only belong to one training group.

Create a relationship with the abbreviation **Q##** with a bottom up relationship **(A) Employee Belongs to ##** and a top down relationship **(B) TGRP Includes**. Create a relationship with the abbreviation **R##** with a bottom up relationship **(A) TGRP is the Child of** and a top down relationship **(B) TGRP is the Parent of**. This allows your new **## Training group** to have subordinate training groups (Child) and be the Parent to subordinate training groups.

Use the data provided in the following table:

Relationship	Relationship bottom up	Relationship top down
Q##	(A) Employee Belongs to ##	(B) TGRP Includes
R##	(A) TGRP is the Child of	(B) TGRP is the Parent of

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Relationship Maintenance* → *Maintain Relationships*. Note: You may have the IMG open in another session. If so, use that session.
 - b) Choose the *New Entries* pushbutton.
 - c) Set up your new relationships as illustrated in the table.
 - d) Save your entries.
4. In the *Allowed Relationships* step, use the *Dialog Structure* to enter the two directions of your new relationship to and from the object type *Person*, as indicated in the table. Your object **##** requires a top down **Q##** relationship with the object type *Person*. The object *Person* requires a bottom up **Q##** relationship with your object **##**. This allows your

training group to include the object Person and allows persons to be assigned to your training group.

In addition, your new object **##** requires a bottom up **R##** relationship with object type **##**, and your object **##** also requires a top down **R##** relationship with your object **##**. This allows your new **## Training group** to have subordinate training groups (Child) and be the *Parent* to subordinate training groups.

OT	Object type text	A/B	Rel	Relationship name	Rel Ob-jtype	Not maint.
##	## Training Group	<i>B</i>	<i>Q##</i>	<i>TGRP includes</i>	<i>P</i>	
<i>P</i>	<i>Person</i>	<i>A</i>	<i>Q##</i>	<i>Employee Belongs to ##</i>	##	

OT	Object type text	A/B	Rel	Relationship name	Rel Ob-jtype	Not maint.
##	## Training Group	<i>A</i>	<i>R##</i>	<i>(A)TGRP is the Child of</i>	##	
##	## Training Group	<i>B</i>	<i>R##</i>	<i>(B) TGRP is the Parent of</i>	##	

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Relationship Maintenance* → *Maintain Relationships*.
 - b) Choose your relationship *Q##* in the *Dialog Structure* column.
 - c) Choose the *Allowed Relationships* pushbutton.
 - d) Choose the *New Entries* pushbutton.
 - e) Enter the information provided in the table.
 - f) Save your entries.
 - g) Go back to the *Change View "Links": Overview* screen.
 - h) Choose your relationship *R##* in the *Dialog Structure* column.
 - i) In the *Dialog Structure* column, double-click *Allowed Relationships*.
 - j) Choose the *New Entries* pushbutton.
 - k) Enter the information provided in the table.
 - l) Save your entries.
5. Create subtypes **AQ##** with the subtype text **Employee Belongs to TGRP**, **BQ##** with the subtype text **TGRP Includes**, **AR##** with the subtype text **Is the Child of**, and **BR##** with the subtype text **Is the Parent of**, for infotype 1001.

Use the data provided in the following table:

Infotype	Infotype Name	Subtype	Subtype text
1001	Relationships	AQ##	Employee Belongs to TRGRP
1001	Relationships	BQ##	TGRP Includes These Empl
1001	Relationships	AR##	Is the Child of
1001	Relationships	BR##	Is the Parent of

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Infotype Maintenance* → *Maintain Subtypes*.
 - b) Choose the *New Entries* pushbutton.
 - c) Enter data from the table provided.
 - d) Choose ENTER to acknowledge the system message 'Choose the key from the allowed namespace'.
 - e) Save your entries.
6. Set up the relationships for your new object type to allow employees the option of belonging to a training group, and to allow your new object ## to be assigned multiple employees and be the parent of multiple subordinate training groups. The object type of Person can only belong to one training group at one time. A subordinate training group can only belong to one parent training group at one time
- Use the data provided in the following table:

Field Name	Value	Description
Object type	P	Person
Infotype	1001	Relationships
Subtype	AQ##	Employee Belongs to TRGRP
Time constraint	2	
Addl. condition		

Field Name	Value	Description
Object type	##	## Training Group
Infotype	1001	Relationships
Subtype	BQ##	TGRP Includes These Empl
Time constraint	3	
Addl. condition		

Field Name	Value	Description
Object type	##	## Training Group

Field Name	Value	Description
Infotype	1001	Relationships
Subtype	AR##	Is the Child of
Time constraint	2	
Addl. condition		

Field Name	Value	Description
Object type	##	## Training Group
Infotype	1001	Relationships
Subtype	BR##	Is the parent of
Time constraint	3	
Addl. condition		

- For object type P, infotype 1001, and subtype AQ##, enter a time constraint of 2.
 - a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Infotype Maintenance* → *Maintain Subtypes*.
 - b) Choose 1001 in the *Infotype* field and AQ## in the *Subtype* field.
 - c) In the *Dialog Structure* column, double-click *Time Constraint*.
 - d) Choose the *New Entries* pushbutton.
 - e) Enter data from the table provided.
 - f) Save your entries.
 - g) Go back to the Change View “*Subtypes*”: *Overview* screen.
- For object type ##, infotype 1001, and subtype BQ##, enter a time constraint of 3.
 - a) Choose 1001 in the *Infotype* field and BQ## in the *Subtype* field.
 - b) In the *Dialog Structure* column, double-click *Time Constraint*.
 - c) Choose the *New Entries* pushbutton.
 - d) Enter data from the table provided.
 - e) Save your entries.
 - f) Go back to the Change View “*Subtypes*”: *Overview* screen.
- For object type ##, infotype 1001, and subtype AR##, enter a time constraint of 2.
 - a) On the Change View “*Subtypes*”: *Overview* Screen, choose 1001 in the *Infotype* field and AR## in the *Subtype* field.
 - b) In the *Dialog Structure* column, double-click *Time Constraint*.

- c) Choose the *New Entries* pushbutton.
- d) Enter data from the table provided.
- e) Save your entries.
- f) Go back to the *Change View "Subtypes": Overview* screen.
- For object type ##, infotype 1001, and subtype BR##, enter a time constraint of 3.
 - a) Choose *1001* in the *Infotype* field and *BR##* in the *Subtype* field.
 - b) In the *Dialog Structure* column, double-click *Time Constraint*.
 - c) Choose the *New Entries* pushbutton.
 - d) Enter data from the table provided.
 - e) Save your entries.
 - f) Go back to the *SAP Easy Access* screen.

Unit 9

Exercise 17

Create Evaluation Paths

Business Example

In your organization, you have divided the employees into training groups. You want to promote the development of these groups using different personnel development measures. You want to create your own evaluation path that displays the organizational structure, including the organizational unit, positions, persons, and their training groups. For this reason, you need to know how to create evaluation paths.

Create evaluation paths for the newly created object types in the object-oriented model of Personnel Planning.

1. Create your own evaluation path **z_##PSO** to display a training group, find employees, their positions, and organizational unit.

Use the data provided in the following table:

No.	Obj.Type	A/B	Re-lat'ship	Relation-ship Name	Priority	Rel. obj.type	Skip
10	##	B	Q##	(B) TGRP Includes	*	P	
20	P	B	008	Holder	*	S	
30	S	A	003	Belongs to	*	O	
40	##	B	R##	(B) TGRP is the Parent of	*	##	

2. Create your own evaluation path **z_OSP##** to display the organizational structure, including the organizational unit, positions, persons and their training group.

Use the data provided in the following table:

No.	Obj.Type	A/B	Re-lat'ship	Relation-ship Name	Priority	Rel. obj.type	Skip
10	O	B	003	Incorporates	*	S	
20	S	A	008	Holder	*	P	
30	P	A	Q##	(A) Employee Belongs to	*	##	

No.	Obj.Type	A/B	Re-lat'ship	Relation-ship Name	Priority	Rel. obj.type	Skip
40	O	B	002	Is line supervisor of	*	O	

3. Set up a default evaluation path **z_##_##_** for your new object type **##_**.

Use the data provided in the following table:

No	Obj.Type	A/B	Re-lat'ship	Relation-ship Name	Priority	Rel. obj.type	Skip
10	##_	B	R##_	(B) TGRP is the Parent of	*	##_	

4. Assign evaluation path **Z_##_##_** for a structural search with a status vector of 1 and based on a key date.

Use the data provided in the following table:

EvalPath	Evaluation path text	Status vec.	Key date	No Unrel.
Z_##_##_		1	V	

Create Evaluation Paths

Business Example

In your organization, you have divided the employees into training groups. You want to promote the development of these groups using different personnel development measures. You want to create your own evaluation path that displays the organizational structure, including the organizational unit, positions, persons, and their training groups. For this reason, you need to know how to create evaluation paths.

Create evaluation paths for the newly created object types in the object-oriented model of Personnel Planning.

1. Create your own evaluation path **z_##PSO** to display a training group, find employees, their positions, and organizational unit.

Use the data provided in the following table:

No.	Obj.Type	A/B	Re-lat'ship	Relation-ship Name	Priority	Rel. obj.type	Skip
10	##	B	Q##	(B) TGRP Includes	*	P	
20	P	B	008	Holder	*	S	
30	S	A	003	Belongs to	*	O	
40	##	B	R##	(B) TGRP is the Parent of	*	##	

- a) On the *SAP Easy Access* screen, choose *Tools* → *Customizing* → *IMG* → *Execute Project* → *SAP Reference IMG*.
- b) In *Customizing*, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Maintain Evaluation Paths*.
- c) Choose the *New Entries* pushbutton.
- d) Enter *EvalPath* as **z_##PSO** with the *Evaluation path text* as **Display training Grp, Find Employees, their Positions, and Org Unit**.
- e) Save your entries.
- f) Choose your new evaluation path **Z_##PSO**.
- g) In the *Dialog Structure* column, double-click *Evaluation Path* (individual maintenance).
- h) Choose the *New Entries* pushbutton.

i) Enter data from the table provided.

j) Save your entries.

2. Create your own evaluation path **z_osp##** to display the organizational structure, including the organizational unit, positions, persons and their training group.

Use the data provided in the following table:

No.	Obj.Type	A/B	Re-lat'ship	Relation-ship Name	Priority	Rel. obj.type	Skip
10	O	B	003	Incorporates	*	S	
20	S	A	008	Holder	*	P	
30	P	A	Q##	(A) Employee Belongs to	*	##	
40	O	B	002	Is line supervisor of	*	O	

a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Maintain Evaluation Paths*.

b) Choose the *New Entries* pushbutton.

c) Enter *EvalPath* as **z_osp##** with the *Evaluation path text* as **Display Org Unit, Position, Persons and their Training Group**.

d) Save your entries.

e) Choose your new evaluation path **Z_OSP##**.

f) In the *Dialog Structure* column, double-click *Evaluation Path* (individual maintenance).

g) Choose the *New Entries* pushbutton.

h) Enter data from the table provided.

i) Save your entries.

3. Set up a default evaluation path **z_##_##** for your new object type **##**.

Use the data provided in the following table:

No	Obj.Type	A/B	Re-lat'ship	Relation-ship Name	Priority	Rel. obj.type	Skip
10	##	B	R##	(B) TGRP is the Parent of	*	##	

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Maintain Evaluation Paths*.
 - b) Choose the *New Entries* pushbutton.
 - c) Enter *EvalPath* as **z_##_##_** with the *Evaluation path text* as **Training Groups and Subordinate Training Groups**.
 - d) Save your entries.
 - e) Choose your new evaluation path **Z_##_##_**.
 - f) In the *Dialog Structure* column, double-click *Evaluation Path* (individual maintenance).
 - g) Choose the *New Entries* pushbutton.
 - h) Enter data from the table provided.
 - i) Save your entries.
4. Assign evaluation path **Z_##_##_** for a structural search with a status vector of 1 and based on a key date.

Use the data provided in the following table:

EvalPath	Evaluation path text	Status vec.	Key date	No Unrel.
Z_##_##_		1	✓	

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Maintain Object Types*.
- b) Choose your *Object Type* ##.
- c) In the *Dialog Structure* column, double-click *Structure Search*.
- d) Choose the *New Entries* pushbutton.
- e) Enter data from the table provided.
- f) Save your entries.

Customize the Object Manager

Business Example

As an organizational management specialist, you are required to maintain and manage the training groups by using the *Organization and Staffing* Interface. You can perform this task by making your new object type available in the object manager.

Add your object type to the object manager and enter the required information.

1. In your company, you have divided the employees into several training groups. You want to promote the development of these groups by using different personnel development measures. You maintain and manage the groups by using the *Organization and Staffing* Interface, and must make your new object type available in the object manager. To add your object type **##** to the object, use the data provided in the following table:

Field Name or Data Type	Values
Search Node Key	Z_TGRP_##
Name	Searches for Object Type ##
Obj. Type	##
Icon name	ICON_PARTNER

Customize the Object Manager

Business Example

As an organizational management specialist, you are required to maintain and manage the training groups by using the *Organization and Staffing* Interface. You can perform this task by making your new object type available in the object manager.

Add your object type to the object manager and enter the required information.

1. In your company, you have divided the employees into several training groups. You want to promote the development of these groups by using different personnel development measures. You maintain and manage the groups by using the *Organization and Staffing* Interface, and must make your new object type available in the object manager. To add your object type ## to the object, use the data provided in the following table:

Field Name or Data Type	Values
Search Node Key	Z_TGRP_##
Name	Searches for Object Type ##
Obj. Type	##
Icon name	ICON_PARTNER

- a) Add your object type ## to the object manager using the data provided in the table.
- b) In Customizing, choose *Personnel Management* → *Organizational Management* → *Hierarchy Framework* → *Object Manager* → *Define Your Own Search Node*. In the *Information* dialog box, choose *Continue*.
- c) In the *Dialog Structure* column, double-click *Definition of Search Node*.
- d) Choose the *New Entries* pushbutton to create a search node for your object type ##.
- e) Enter the data provided in the table.
- f) Save your data and return to Customizing.



Note:

If you receive a Customizing request, choose *Create*. In the description field, enter your group number and *Save*. Choose *Continue* to exit the transport request.

Add a Search Node to the Organization and Staffing interface

Business Example

As a personnel administrator, you have to ensure that the new personnel development concept with training groups is represented on the *Organization and Staffing* interface in the hierarchy framework. To do so, you need to set up search tools to create search nodes as per your requirements.

Set up search tools in a scenario to create 2 searches, and add your node with the 2 searches into a folder. Create a root *Training Group* and a new structure for your object type. Add 2 subordinate *Training Groups* to the root *Training Group*, and test your configuration on the *Organization and Staffing* interface.

1. For your search node, set up the search tools *Search Term* and *Structure Search* in the scenario **OME000**. Use the data provided in the tables to set up your two new search entries.

Enter the following data:

Field Name or Data Type	Values
Obj. Manager Scenario	OME000
Search Node Key	Z_TGRP_##
Search tool	CL_HR_OM_SEARCHTOOL_ORGP
Name	## Search Term
Interaction tool	CL_HR_OM_IAT_ORGP
Position	2
Standard search	X
Column group	NF_STO
Header type	ORGSTRUC

Field Name or Data Type	Values
Obj. Manager Scenario	OME000
Search Node Key	Z_TGRP_##
Search tool	CL_HR_OM_SEAT_STRUCTURAL_SEARCH
Name	## Structure Search
Interaction tool	CL_HR_OM_IAT_ORGP

Field Name or Data Type	Values
Position	1
Standard search	
Column group	NF_STO
Header type	ORGSTRUC

2. Add your node with the 2 searches into a folder that will display on the *Organization and Staffing* interface (transaction code PPOME).

Use the data provided in the following table:

Obj. Manager Scenario	Search Node Key	Name	Position	Column group	Column header type
OME000	Z_TGRP_##	Training Group ##	##	NF_STO	ORGSTRUC

3. Test your configuration changes. Your folder with the 2 searches is now visible on the *Organization and Staffing* interface (transaction code PPOME).
4. You would like to further organize your training groups. Create your new structure for object type ##, which will be your root training group.

Enter the data from the following table for your structure:

Object Type	Abbreviation	Name	Evaluation Path	Validity period
##	## TG	## My Root Training Group	Z_##_##	01.01 of the current year to 12.31.9999

5. From your root training group, create 2 subordinate training groups using the data provided in the table.

Abbr.	Name
## TG1	## TGrp 1 SAP Payroll
## TG2	## TGrp 2 SAP Benefits

6. Test your configuration on the *Organization and Staffing* interface and review your new training group search options.

My Root Training Group
Below your ## Training Group, you can see:
TGrp 1 SAP Payroll
TGrp 2 SAP Benefits
Training Group ##

Add a Search Node to the Organization and Staffing interface

Business Example

As a personnel administrator, you have to ensure that the new personnel development concept with training groups is represented on the *Organization and Staffing* interface in the hierarchy framework. To do so, you need to set up search tools to create search nodes as per your requirements.

Set up search tools in a scenario to create 2 searches, and add your node with the 2 searches into a folder. Create a root *Training Group* and a new structure for your object type. Add 2 subordinate *Training Groups* to the root *Training Group*, and test your configuration on the *Organization and Staffing* interface.

1. For your search node, set up the search tools *Search Term* and *Structure Search* in the scenario **OME000**. Use the data provided in the tables to set up your two new search entries.

Enter the following data:

Field Name or Data Type	Values
<i>Obj. Manager Scenario</i>	OME000
<i>Search Node Key</i>	Z_TGRP_##
<i>Search tool</i>	CL_HR_OM_SEARCHTOOL_ORGP
<i>Name</i>	## Search Term
<i>Interaction tool</i>	CL_HR_OM_IAT_ORGP
<i>Position</i>	2
<i>Standard search</i>	X
<i>Column group</i>	NF_STO
<i>Header type</i>	ORGSTRUC

Field Name or Data Type	Values
<i>Obj. Manager Scenario</i>	OME000
<i>Search Node Key</i>	Z_TGRP_##
<i>Search tool</i>	CL_HR_OM_SEAT_STRUCTURAL_SEARCH
<i>Name</i>	## Structure Search
<i>Interaction tool</i>	CL_HR_OM_IAT_ORGP

Field Name or Data Type	Values
<i>Position</i>	1
<i>Standard search</i>	
<i>Column group</i>	NF_STO
<i>Header type</i>	ORGSTRUC

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Hierarchy Framework* → *Integrate New Object Type* → *Add Object Type to Object Manager*.
 - b) In the *Choose Activity* dialog box, select *Assign Search Tools to Your Own Search Node* and choose *Continue*.
 - c) Choose the *New Entries* pushbutton.
 - d) Enter data provided in the table.
 - e) Save your entries.
 - f) Repeat the process for the second search tool using the data provided in the table.
2. Add your node with the 2 searches into a folder that will display on the *Organization and Staffing* interface (transaction code **PPOME**).

Use the data provided in the following table:

Obj. Manager Scenario	Search Node Key	Name	Position	Column group	Column header type
OME000	Z_TGRP_##	Training Group ##	##	NF_STO	ORGSTRUC

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Hierarchy Framework* → *Integrate New Object Type* → *Add Object to Object Manager*.
 - b) In the *Choose Activity* dialog box, choose *Adjust Search Area*.
 - c) Choose *New Entries* pushbutton.
 - d) Enter the data provided in the table.
 - e) Save your entries.
3. Test your configuration changes. Your folder with the 2 searches is now visible on the *Organization and Staffing* interface (transaction code **PPOME**).
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *Organization and Staffing* → *Change*. Your new entries are displayed in the *Find By* screen area.
 - b) You can now see your folder titled – *Training Group ##*.
 - c) Open your folder and you can see your two search tools *## Structural Search* and *## Search Term*.

d) Return to the *SAP Easy Access* screen.

4. You would like to further organize your training groups. Create your new structure for object type **##**, which will be your root training group.

Enter the data from the following table for your structure:

Object Type	Abbreviation	Name	Evaluation Path	Validity period
##	## TG	## My Root Training Group	Z_##_##_	01.01 of the current year to 12.31.9999

a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *General Structures* → *Create* (PPSC).

b) Enter the data provided in the table for your structure.

c) Choose the *Create* pushbutton.

d) Return to the *SAP Easy Access* screen.

5. From your root training group, create 2 subordinate training groups using the data provided in the table.

Abbr.	Name
## TG1	## TGrp 1 SAP Payroll
## TG2	## TGrp 2 SAP Benefits

a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Organizational Plan* → *General Structures* → *Change* (PPSM).

b) Your object type **##** defaults with the evaluation path **Z_##_##_**.

c) Press ENTER.

d) Place the cursor on your **## My Root Training Group** and choose the *Create* pushbutton.

e) Enter data provided in the table.

f) Choose *Save*.

6. Test your configuration on the *Organization and Staffing* interface and review your new training group search options.

My Root Training Group
Below your ## Training Group , you can see:
TGrp 1 SAP Payroll
TGrp 2 SAP Benefits
Training Group ##

a) On the *SAP Easy Access* screen, run the transaction **PPOME**.

- b) In the object manager *Find By* section, you can see your *folder – Training Group ##*.
- c) Open your folder, and you can see *## Structure Search* and *## Search Term*.
- d) Double-click your *## Structure Search* and you can see the following in the hit list area:

My Root Training Group
Below your ## Training Group, you can see:
TGrp 1 SAP Payroll
TGrp 2 SAP Benefits
Training Group ##

- e) Choose *## Search Term*.
- f) In the *Find Training Group* dialog box, choose the *Find* pushbutton.
- g) You can see the following in the *Hit list*:

Training Group ##
My Root Training Group
TGrp 1 SAP Payroll
TGrp 2 SAP Benefits

Customize the Structural Overview of Objects

Business Example

Your department wants to maintain the newly created object type on the *Organization and Staffing* interface. You need to create a structure to enter the transaction with all the relevant information.

You want to work with your new object type **##** in the overview and detail areas of the *Organization and Staffing* interface. Add your new object type **##** to the overview and detail areas (**##** is the group number).

1. To add your new object to the overview and detail areas, you must define your own service for the structural overview object using the information provided in the table:

Field Name or Data Type	Values
Interface object service	Z_##_P_O
Object Key	GOWD (General Overview With De- tail)

Field Name or Data Type	Values
Interface object service	Z_O_P_##
Object Key	GOWD (General Overview With De- tail)

2. Assign attributes to your new object types using the information provided in the following table:

Field Name or Data Type	Values
Interface object service	Z_##_P_O
Object Type	##
Selection	Multiple selection
Evaluation Path	Z_##PSO
Technical depth	
Column group	NF_GEN_OV (General Overview)
Header type	ORGSTRUC

Field Name or Data Type	Values
Interface object service	Z_O_P_##

Field Name or Data Type	Values
Object Type	O
Selection	Multiple selection
Evaluation Path	Z_OSP##
Technical depth	3
Column group	NF_GEN_OV (General Overview)
Header type	ORGSTRUC

Repeat the process for your *Interface Object Z_O_P_##*.

- Define your requests for scenario **OME0** and assign a text for your new object that will display in the Overview Area and in the GoTo menu of the *Organization and Staffing* interface. Use the scroll bar to view all columns.

Use the data provided in the following table:

Scenario	Hierarchy frame work request	Name	Service for 1st interface object	Service for 2nd interface object
OME0	Z_##_P_O	## Training Groups with Persons and Org	Z_##_P_O	DETAIL (GENERAL)
OME0	Z_O_P_##	## Org Units with Persons in TrGrps	Z_O_P_##	DETAIL (GENERAL)

- Assign your own requests to an object type using the data provided in the following table:

Scenario	Request	Object Type	Standard action
OME0	Z_##_P_O	##	X
OME0	Z_O_P_##	O	X

- Test your configuration.
- Test your configuration by assigning Winnie Chung, personnel number 540991##, to your ## TGRP 1 SAP Payroll.

Customize the Structural Overview of Objects

Business Example

Your department wants to maintain the newly created object type on the *Organization and Staffing* interface. You need to create a structure to enter the transaction with all the relevant information.

You want to work with your new object type ## in the overview and detail areas of the *Organization and Staffing* interface. Add your new object type ## to the overview and detail areas (## is the group number).

1. To add your new object to the overview and detail areas, you must define your own service for the structural overview object using the information provided in the table:

Field Name or Data Type	Values
Interface object service	Z_##_P_O
Object Key	GOWD (General Overview With De-tail)

Field Name or Data Type	Values
Interface object service	Z_O_P_##
Object Key	GOWD (General Overview With De-tail)

- a) In Customizing, choose *Personnel Management* → *Organizational Management* → *Hierarchy Framework* → *Integrate New Object Type* → *Display Object Type in Structural Overview Object*.
- b) In the *Choose Activity* dialog box, choose *Define Your Own Service for Structural Overview Object*. Acknowledge any system messages.
- c) In the *Dialog Structure* column, double-click *Definition Service*.
- d) Choose the *New Entries* pushbutton.
- e) Define your own service by entering the information provided in the table.
- f) Save your entries.
- g) Repeat the process to enter your second definition service by returning to the *New Entries: Overview of Added Entries* screen.
- h) Enter the data provided in the table.
- i) Save your entries.

j) Return to the *Change View Definition Service: Overview* screen.

2. Assign attributes to your new object types using the information provided in the following table:

Field Name or Data Type	Values
<i>Interface object service</i>	Z_##_P_O
<i>Object Type</i>	##
<i>Selection</i>	Multiple selection
<i>Evaluation Path</i>	Z_##PSO
<i>Technical depth</i>	
<i>Column group</i>	NF_GEN_OV (General Overview)
<i>Header type</i>	ORGSTRUC

Field Name or Data Type	Values
<i>Interface object service</i>	Z_O_P_##
<i>Object Type</i>	O
<i>Selection</i>	Multiple selection
<i>Evaluation Path</i>	Z_OSP##
<i>Technical depth</i>	3
<i>Column group</i>	NF_GEN_OV (General Overview)
<i>Header type</i>	ORGSTRUC

- a) Select your new service **Z_##_P_O**.
- b) In the *Dialog Structure* column, double-click *Attribute Service*.
- c) Choose the *New Entries* pushbutton.
- d) Enter the data provided in the table.
- e) Save your entries.
- f) Return to the *New Entries: Overview of Added Entries* screen.

Repeat the process for your *Interface Object Z_O_P_##*.

- a) Select your new service **Z_O_P_##**.
- b) In the *Dialog Structure* column, double-click *Attribute Service*.
- c) Choose the *New Entries* pushbutton.
- d) Enter the data provided in the table.
- e) Save your entries.
- f) Return to the *Change View Scenario Definition (Hierarchy Framework): Overview* screen.

3. Define your requests for scenario **OME0** and assign a text for your new object that will display in the *Overview Area* and in the *GoTo* menu of the *Organization and Staffing* interface. Use the scroll bar to view all columns.

Use the data provided in the following table:

Scenario	Hierarchy frame work request	Name	Service for 1st interface object	Service for 2nd interface object
OME0	Z_##_P_O	## Training Groups with Persons and Org	Z_##_P_O	DETAIL (GENERAL)
OME0	Z_O_P_##	## Org Units with Persons in TrGrps	Z_O_P_##	DETAIL (GENERAL)

- In Customizing, choose *Personnel Management > Organizational Management > Hierarchy Framework > Integrate New Object Type > Display Object Type in Structural Overview Object*.
 - In the *Choose Activity* dialog box, select *Define Your Own Service for Structural Overview Object* and acknowledge any system messages.
 - In the *Change View Scenario Definition (Hierarchy Framework): Overview* screen, choose **OME0**.
 - In the *Dialog Structure* column, double-click *Request Definition*.
 - Choose the *New Entries* pushbutton.
 - Enter the data from the table provided.
 - Save your entries.
 - Return to the *Choose Activity* dialog box.
4. Assign your own requests to an object type using the data provided in the following table:

Scenario	Request	Object Type	Standard action
OME0	Z_##_P_O	##	X
OME0	Z_O_P_##	O	X

- In the *Choose Activity* dialog box, select *Assign Your Own Request to an Object Type*.
- Choose the *New Entries* pushbutton.
- Enter the data provided in the table.



Note:
Use the scroll bar at the bottom of your screen to view all columns.

- Save your entries.

- e) Return to the *Change View Hierarchy Framework: Interaction Tool Attributes: Overview* screen.
 - f) Choose the *New Entries* pushbutton.
 - g) Enter the data for your second entry from the provided table.
 - h) Save your data.
5. Test your configuration.
- a) On the *SAP Easy Access* screen, execute the transaction *PPOME*.
 - b) Choose your folder *Training Group ##*.
 - c) Double-click *## TGrp SAP Payroll*.
 - d) You can see your *## TGrp SAP Payroll* in the *Overview* area.
6. Test your configuration by assigning Winnie Chung, personnel number 540991##, to your *## TGRP 1 SAP Payroll*.
- a) Right-click *## TGrp SAP Payroll* and from the options choose *Assign*.
 - b) Choose *Person*.
 - c) Choose *Continue*.
 - d) In the dialog box, search for Winnie Chung, personnel number 540991##. Choose the *Structure Search* tab.
 - e) In the *Choose Person* dialog box, choose *Org Units Training Group → Training International → Executive Board → ## Executive Board → ## Human Resources Director*.
 - f) Choose *Winnie Chung*. Hint: To assign additional employees from Winnie's Org unit, open other positions and select the check box for the holder. You cannot assign positions since it is not an allowed relationship for Training Groups.
 - g) Choose *Continue*.
 - h) In the *Person Assign* dialog box, choose *Continue*. Winnie Chung should now be listed as belonging to *## TGRP 1 SAP Payroll*.
 - i) Choose *GoTo*. You can see *## Training Groups with Persons and Org*.

Execute a Standard Report

Business Example

Your company wants to report on the data contained in OM. As a personnel manager, you need to create a structure to represent the organizational data in a logical manner.

Create a report on an organizational plan by using the standard reports.



Note:

Choose  (SAP Menu) before you start the exercise.

1. Identify persons in your organizational structure.
2. Identify and display tasks assigned to your positions.
3. Report on vacant positions in your organizational structure.

Execute a Standard Report

Business Example

Your company wants to report on the data contained in OM. As a personnel manager, you need to create a structure to represent the organizational data in a logical manner.

Create a report on an organizational plan by using the standard reports.



Note:

Choose  (SAP Menu) before you start the exercise.

1. Identify persons in your organizational structure.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Info System* → *Organizational Unit* → *Organizational Structure* → *Organizational Structure with Persons*.
 - b) Enter the name of your higher-level organizational unit (**## Human Resources**). In the *Organizational unit* field, choose *Search help*. In the *Search Term* field, enter **## Human*** and choose *Start Search*. Select **## Human Resources** and choose *Copy*.
 - c) Choose the *Execute* pushbutton and review the report.
 - d) Return to the *SAP Easy Access* screen.
2. Identify and display tasks assigned to your positions.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *InfoSystem* → *Position* → *Task Description for Positions*.
 - b) In the *Position* field, choose *Search help*. The *Search help* dialog box is displayed. In the *Search Term* field, enter **##*** and choose *Start Search*. Select **## Admin Personnel Administration**, **## Administrator Personnel Development**, and **## HR Manager** from the selection list and choose *Copy*.
 - c) Choose *Execute* and review the report.
3. Report on vacant positions in your organizational structure.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *InfoSystem* → *Position* → *Vacant Positions*.
 - b) Enter **01** as the *Plan Version* and in the *Object Type* field, enter **o**. In the *Object ID* field, search for **## Human Resources** by choosing the input help. In the *Search Term* field of the *Organizational Unit* dialog box, enter **## Human*** and choose *Start Search*. Choose **## Human Resources** from the list displayed in the *Organizational Unit* dialog box and choose *Copy*.

- c) Choose the *Execute* pushbutton and review the report.
- d) Return to the *SAP Easy Access* screen.

Execute a General Standard Report

Business Example

Your company wants to report on the data contained in OM. Data has to be reported along the organizational structure and needs to be represented graphically. As a personnel manager, you need to create a graphical structure to represent the organizational data.

Create a report on the data for your organizational units using General Reports.



Note:

Choose  (SAP Menu) before you start the exercise.

1. Display the organizational plan for **## Human Resources** as a graphic.
2. Run HR report RPLICO10 for employees within your organizational structure.

Execute a General Standard Report


Business Example

Your company wants to report on the data contained in OM. Data has to be reported along the organizational structure and needs to be represented graphically. As a personnel manager, you need to create a graphical structure to represent the organizational data.

Create a report on the data for your organizational units using General Reports.



Note:

Choose  (SAP Menu) before you start the exercise.

1. Display the organizational plan for **## Human Resources** as a graphic.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Info System* → *General* → *PD Graphics Interface*.
 - b) Enter **01** in the *Plan Version* field and enter **0** in the *Object type* field.
 - c) In the *Object ID* field, search **## Human Resources** by choosing the input help. The *Organization Unit* dialog box is displayed. In the *Search Term* field, enter **## Human*** and choose *Start Search*. From the list displayed, choose **## Human Resources** and choose *Copy*. In the *Evaluation Path* field, enter **O-S-P**.
 - d) Choose the *Execute* pushbutton and review the report.
 - e) Return to the *SAP Easy Access* screen.
2. Run HR report RPLICO10 for employees within your organizational structure.
 - a) On the *SAP Easy Access* screen, choose *Human Resources* → *Organizational Management* → *Info System* → *General* → *HR Master Data* → *Start HR Reporting via Personnel Planning Structures*.
 - b) Enter **01** in the *Plan Version* field and enter **0** in the *Object Type* field.
 - c) In the *Object ID* field, search **## Human Resources** by choosing the input help. The *Organizational Unit* dialog box is displayed. In the *Search Term* field, enter **## Human*** and choose *Start Search*. From the list displayed, choose **## Human Resources** and choose *Copy*. In the *Evaluation Path* field, enter **O-S-P**. Enter **RPLICO10** in the *PA reporting* field.
 - d) Choose the *Execute* pushbutton. Select fields of your choice and choose *Continue*. In the *Confirmation* dialog box, choose *Yes* to transfer the selected fields.
 - e) Review the report.
 - f) Return to the *SAP Easy Access* screen.

Set Up and Verify an Organizational Structure Configuration

Business Example:

Your company has four sales regions. This year you will be rolling out the next best thing in bicycles. For the roll out, the company has purchased a large mobile demonstration vehicle which will travel the country for sales demonstrations. This vehicle will be shared between the regions and you want to create a structure of the sales regions as well as create a new object type to reflect the demonstration vehicle and track its assignment to regions.

The regions will be represented through the organizational structure. All four regions roll up to the National Sales Organizational unit. The four regions, represented by Organizational Units, are Sales-North, Sales -West, Sales- South and Sales-East. Each has five positions including a Sales Vice President, Sales Manager and three sales reps. Consider creating new jobs to be assigned to these positions. (As usual include your number in all of your entries to ensure you are working with your data.).

When hiring into these new positions we want to ensure they default the correct Personnel Area – CABB, Personnel Subarea – Sales, Active Employee Group and Salaried Employee Subgroup. There are chief positions for each region and cost centers will all be the same. Appropriate rates of pay should default for each of the positions. You may wish to create a job for each of the large classifications and associate an appropriate default rate of pay for each. The individual positions may override the default if appropriate.

Through general structures you will want to depict the time frame each region is assigned to the vehicle. To track the demonstration vehicle you will create a new object called ## Demonstration Vehicle and create or use an existing relationship to track date driven assignment of the vehicle. You will regularly want to report on the assignment of the vehicles to the regions. The sales department will later report on revenues based on sales data. You won't have access to the sales revenue but do want to report on the demonstration vehicles assignments and time frames per region. You will need to develop an evaluation path to be utilized through general structures to show the assignments.

1. Effective the first of the year create the hierarchy of the new Sales Organization under Training International and include the appropriate positions. Create and/or assign jobs to positions. Assign defaults, as listed in the case study scenario using a combination of transactions such as Organization and Staffing and Expert Mode transactions. For notes on completing the exercise, refer to the Organization and Staffing Unit and the unit of Expert Mode.
2. Hire an employee into the desired position of your choice to ensure your defaults on the Personnel Administration infotypes. Refer to the Integration in OM unit for hints.
3. Create a new object to represent the demonstration vehicle. Create a new object type with the object abbreviation 40 +## (for example group 05 would be 45) and the name 40 + ## Demonstration Vehicle. Be sure to include your number in all entries. For notes on completing the exercise, refer to the unit on Enhancing the Data model.

4. Create or utilize an existing relationship to store the relationship between organizational unit and demonstration vehicle. Additionally create the subtypes of Infotype 1001 to store the relationships and assign the appropriate time constraints. For notes on completing the exercise, refer to the unit Organizational Management Concepts or the unit Data Model in OM or the unit on enhancing the data model.
5. Set up the time constraints for your new object type to allow the demonstration vehicle to only be assigned to one organizational unit at a time. It is possible that two or more demonstration vehicles could be assigned to the Organizational unit at any given time.
6. Create evaluation paths that allow you to report on the relationship from vehicle to organizational unit. The vehicle is assigned to the organizational units directly. (If you prefer to assign the vehicle directly to the Vice President position in each region you will need to go back to the allowed relationship steps and add a relationship from position to vehicle and vice versa. The steps below would need to be expanded to include your new relationship). You want to be able to report from the perspective of the *Organizational unit* to the vehicle. You also may wish to report starting from the perspective of the vehicle to assigned organizational unit. For notes on completing the exercise, refer to the unit Organizational Management Concepts or the unit Data Model Enhancements in OM. Create your own evaluation path Z_40+## to display Organizational Units to Demonstration Vehicles and a second one Z_70+## to display Demonstration Vehicles to Organizational Units.
7. Using general structures assign the vehicle to different organizational units/positions over different time frames. For notes on completing the exercise, refer to the unit General Structures.
8. View the assignments through a report both as an ABAP list report and as a graphic report.
9. Produce a report of the Vehicles assignments to the organizational structure. See units on either General Structures or the Evaluations and reports in OM for hints.

Set Up and Verify an Organizational Structure Configuration

Business Example:

Your company has four sales regions. This year you will be rolling out the next best thing in bicycles. For the roll out, the company has purchased a large mobile demonstration vehicle which will travel the country for sales demonstrations. This vehicle will be shared between the regions and you want to create a structure of the sales regions as well as create a new object type to reflect the demonstration vehicle and track its assignment to regions.

The regions will be represented through the organizational structure. All four regions roll up to the National Sales Organizational unit. The four regions, represented by Organizational Units, are Sales-North, Sales -West, Sales- South and Sales-East. Each has five positions including a Sales Vice President, Sales Manager and three sales reps. Consider creating new jobs to be assigned to these positions. (As usual include your number in all of your entries to ensure you are working with your data.).

When hiring into these new positions we want to ensure they default the correct Personnel Area – CABB, Personnel Subarea – Sales, Active Employee Group and Salaried Employee Subgroup. There are chief positions for each region and cost centers will all be the same. Appropriate rates of pay should default for each of the positions. You may wish to create a job for each of the large classifications and associate an appropriate default rate of pay for each. The individual positions may override the default if appropriate.

Through general structures you will want to depict the time frame each region is assigned to the vehicle. To track the demonstration vehicle you will create a new object called ## Demonstration Vehicle and create or use an existing relationship to track date driven assignment of the vehicle. You will regularly want to report on the assignment of the vehicles to the regions. The sales department will later report on revenues based on sales data. You won't have access to the sales revenue but do want to report on the demonstration vehicles assignments and time frames per region. You will need to develop an evaluation path to be utilized through general structures to show the assignments.

1. Effective the first of the year create the hierarchy of the new Sales Organization under Training International and include the appropriate positions. Create and/or assign jobs to positions. Assign defaults, as listed in the case study scenario using a combination of transactions such as Organization and Staffing and Expert Mode transactions. For notes on completing the exercise, refer to the Organization and Staffing Unit and the unit of Expert Mode.
 - a) Navigate to the Organization and Staffing Interface. On the *SAP Easy Access* screen, choose *Human Resources > Organizational Management > Organizational Plan > Organization and Staffing > Change*.
 - b) Use 01/01 of the current year as the start date. Click the *Date and Preview period* pushbutton and enter **01/01/YY** as the date and **3 months** as the *Preview period*.

- c) Create the new objects under Training International. Use the search area in the upper left-hand quadrant to search for the organizational unit *Training International*. In the *Search Results* screen area double-click *Training International* to move it into the *Overview Area*.
 - d) Choose the *Create* icon. You are asked what type of object you want to create. Choose *Organizational Unit*. Name your top Sales Organizational Unit as desired. For example **## National Sales Teams**. As all positions will use the same cost center on the *Account Assignment* tab (in the details area) enter the cost center **4711**. Assign the following: *Personnel Area CABB*, *Subarea 0001*, *Employee Group 1*, and *Subgroup X0*.
 - e) Choose the **## National Sales** and choose *Go To > Staff Assignments (Structure)*. Create four subordinate organizational units, all rolling up to **## National Sales**. With your cursor on **## National Sales Teams** choose *Create* and select *Organizational Unit*. Name your first one **## Sales-North**. Repeat these steps to create **## Sales-South**, **## Sales-East** and **## Sales-West**. Alternatively create one organizational unit, including the defaults and with the positions as described below and then copy the individual objects 3 times changing the name of organizational units and position names as appropriate.
 - f) Choose your first *Organizational Unit* and create the five positions as described in the scenario. Select your **## Sales-North** and choose *Create*. Choose *Position*. In the details quadrant name the position **## Sales VP North**. Choose *Save*. Repeat this process by returning to the **## Sales-North** organizational unit and creating the next position **## Sales Manager North**. Repeat this process to create the remaining three positions for the **## Sales Rep North** positions. This structure should be created under all four regions. Repeat the steps until each region has the five positions with attributes as listed in the scenario.
 - g) Assign jobs to the positions. You may either search for existing jobs such as *VP* for the Vice President jobs by clicking in the *Job* field on the *Basic Data* tab in the *Detail area* and searching for suitable entries or you can create new jobs by going to the menu and choosing *Edit > Create jobs*. Name and assign as desired. Repeat the steps until each position has a describing job assigned.
 - h) We will hire an employee for one of the positions and also want a default rate of pay to fill the fields on the *Basic Pay* Infotype. For the positions that you intend to fill assign the *Planned Compensation* for the appropriate position (your choice). Navigate to *Expert Mode > Human Resources > Organizational Management > Expert Mode > Position*. Enter **your object ID** for the position that you intend to fill with a new hire such as the VP Position. Choose the *Planned Compensation* infotype and enter **the first of the year** as the *valid from date* and choose *Create*. Select the tab for *Pay Scale* and enter **Country Grouping – Other Countries, P. Scale Type 01, PS Area 01, ESG for CAP 3** and choose the *Pay Scale Group E03 level 01*. Save the infotype. You may repeat these steps for your other describing jobs. We will only fill one position so if you want to create it for just one position that is fine.
2. Hire an employee into the desired position of your choice to ensure your defaults on the Personnel Administration infotypes. Refer to the Integration in OM unit for hints.
 - a) On the *SAP Easy Access* screen, choose *Human Resources > Personnel Administration > HR Master Data > Personnel Actions*.

- b) Enter your *Personnel number* **505998##** and **today's date** as the *Start date*. Choose the personnel action *Hiring HR505* and choose *Execute*.
 - c) On the *Actions* infotype search using the structure search for your position that you wish to fill. For example **## Sales VP**. After **entering the position** choose *Enter*. Defaults should fill the *Personnel Area*, *Employee group* and *Subgroup*. Choose *Save* and you will be taken to the next infotype.
 - d) On the *Personal Data* infotype, enter a **name** and **date of birth** of your choice. Choose *Save*.
 - e) For the *Organizational Assignment* infotype observe which fields have already been filled and choose *Save*. If prompted to delimit vacancy, select *Yes*.
 - f) Enter and save data for all other infotypes in the action with data of your choice. You should note that when you get to the *Basic Pay* infotype the default rate of pay should appear. It is not necessary to save the *Communications* infotype.
3. Create a new object to represent the demonstration vehicle. Create a new object type with the object abbreviation **40+##** (for example group 05 would be 45) and the name **40+## Demonstration Vehicle**. Be sure to include your number in all entries. For notes on completing the exercise, refer to the unit on Enhancing the Data model.
- a) In *Customizing*, choose *Personnel Management > Organizational Management > Basic Settings > Data Model Enhancement > Maintain Object Type*.
 - b) Choose the *New Entries* pushbutton and create a new object type with the *Object Type* **40+##** and text **40+## Demonstration Vehicle**.
 - c) Under the *Icon Name* column enter the name **ICON_TRANSPORT** or other icon of your choice. *Save* your entries.
 - d) Add your object as available to maintain on at least Infotypes 1000, 1001 and 1002. You may add additional infotypes of your choice. In *Customizing*, choose *Personnel Management > Organizational Management > Basic Settings > Data Model Enhancement > Infotype Maintenance > Maintain Infotypes*.
 - e) Choose 1000 in the infotype field and double-click *Infotypes per Object type* in the *Dialog Structure*. Choose the *New Entries* pushbutton. Enter *Object type* **40+##** and infotype **1000**. Choose *Save*.
 - f) Go back to the list of infotypes and repeat these steps for infotypes 1001 and 1002.
 - g) Test that the object can be created in *Expert Mode*. On the *SAP Easy Access* screen, choose *Human Resources > Organizational Management > Expert Mode > General*.
 - h) Confirm the *Plan version* is *Current Plan* and choose **40+## Demonstration** as the object type. Remove any existing object ID numbers. Select the *Object* Infotype and choose *Create*. Enter a **short and long text of your choice** for your vehicle. Choose *Save*.
4. Create or utilize an existing relationship to store the relationship between organizational unit and demonstration vehicle. Additionally create the subtypes of Infotype 1001 to store the relationships and assign the appropriate time constraints. For notes on completing the exercise, refer to the unit Organizational Management Concepts or the unit Data Model in OM or the unit on enhancing the data model.

- a) Create a relationship Q40+## with *text of your choice* for the A and B relationships (For example the A text could be Is assigned to and the B text could be Has possession of). In *Customizing*, choose *Personnel Management > Organizational Management > Basic Settings > Data Model Enhancement > Relationship Maintenance > Maintain Relationships*.
- b) Create the allowed relationship between the Organizational Units and the Vehicle. Choose your relationship Q40+##.
- c) Double-click *Allowed Relationships* in the *Dialog Structure*.
- d) Choose *New Entries*. Enter information from the table.

OT	Object Text	A/B	Rel	Relationship Name	Rel Object	Not Maintained
O	Org Unit	B	Q40+##	Has Possession of	40+##	
40+##	40 +## Demonstration Vehicle	A	Q40+##	Is assigned to	O	

- e) Create the subtypes for infotype 1001. In *Customizing*, choose *Personnel Management > Organizational Management > Basic Settings > Data Model Enhancement > Infotype Maintenance > Maintain Subtypes*.
- f) Choose *New Entries* and enter the data from the table. (Ignore warnings about the name range).

Infotype	Infotype Name	Subtype	Subtype Text
1001	Relationships	AQ40+##	Vehicle assigned to
1001	Relationships	BQ40+##	Org unit has possession of

5. Set up the time constraints for your new object type to allow the demonstration vehicle to only be assigned to one organizational unit at a time. It is possible that two or more demonstration vehicles could be assigned to the Organizational unit at any given time.
 - a) From the *Dialog Structure* on the *Maintain Subtypes* activity, highlight your first line and choose *Time Constraint*.
 - b) Choose the *New Entries* and enter object type **40+##** in the *object ID* field. In the *Infotype* field enter **1001** and for the relationship enter **AQ40+##** with the time constraint **2**.
 - c) Back up and select your second line and double-click *Time Constraint*. Choose *New Entries* and enter object type **O** in the *Object ID* field. In the *Infotype* field enter **1001** and for the relationship enter **BQ40+##** with the time constraint of **3**. Save the screen.
 - d) Optionally test that a relationship can be created between an Organizational Unit and your demonstration Vehicle. Navigate to *Expert Mode*. From the *SAP Easy Access*

screen choose *Human Resources > Personnel Management > Organizational Management > Expert Mode General*. Choose the *Object type* O and choose one of your Sales Organizations. Enter a **start and end date of any three month period in the current year**. Choose the *Relationship* infotype and *Create*. In the *type of related object* choose your object type 40+## and in the ID of related Object choose your object type. In the *Relationship Type* field choose the drop down. Only your BQ40+## should appear. Select it and choose *Save*. You can display the reciprocal relationship was created by backing out and changing the object type to your 40+## and viewing the relationship infotypes. You should see that an AQ40+## was created between your Vehicle and the *Organizational Unit*.

6. Create evaluation paths that allow you to report on the relationship from vehicle to organizational unit. The vehicle is assigned to the organizational units directly. (If you prefer to assign the vehicle directly to the Vice President position in each region you will need to go back to the allowed relationship steps and add a relationship from position to vehicle and vice versa. The steps below would need to be expanded to include your new relationship). You want to be able to report from the perspective of the *Organizational unit* to the vehicle. You also may wish to report starting from the perspective of the vehicle to assigned organizational unit. For notes on completing the exercise, refer to the unit *Organizational Management Concepts* or the unit *Data Model Enhancements in OM*. Create your own evaluation path Z_40+## to display Organizational Units to Demonstration Vehicles and a second one Z_70+## to display Demonstration Vehicles to Organizational Units.
 - a) In *Customizing* choose *Personnel Management > Organizational Management > Basic Settings > Maintain Evaluation Paths*.
 - b) Choose the *New Entries* pushbutton. Enter your first evaluation path **z_40+##** with the *Evaluation Path Text* of **your choice** (for example Org Units to Demonstration Vehicle ##). *Save* your entries.
 - c) Highlight your entries and in the *Dialog Structure* double-click *Evaluation Path (individual maintenance)*. Choose the *New Entries* pushbutton. Enter the data provided in the table.

No.	Obj type	A/B	Relationship	Rel Name	Priority	Rel Obj Type	Skip
10	O	B	Q40+##	Will fill upon saving	*	40+##	
20	O	B	002	Will fill upon saving	*	O	

- d) Create your second evaluation path for Z_70+## by repeating the steps above but reverse the directions. Enter the data provided in the table.

No.	Obj Type	A/B	Relationship	Rel Name	Priority	Rel Obj Type	Skip
10	40+##	A	Q40+##	Will fill upon saving	*	O	
20	O	A	002	Will fill upon saving	*	O	

7. Using general structures assign the vehicle to different organizational units/positions over different time frames. For notes on completing the exercise, refer to the unit General Structures.
 - a) From the *SAP Easy Access* screen, choose *Human Resources > Organizational Management > Organizational Plan > General Structures > Change*. (Alternatively you could use transaction code `PPSM`.) On the *Report Selection* screen, enter *Object type O*. In the *Object ID* select your `##` National Sales office. For the Evaluation path enter `z_40+##`. Choose the editing period to be **today's date to 12/31/9999**. Choose *Enter*.
 - b) Expand your structure so that all Sales Organizations are displayed. If you tested your relationship previously one of your organizational units should already have an assignment. Create assignments to the vehicle for the other three organizational units spreading the assignments to 3 month periods over the next year. To do so click the first organizational unit you wish to work with. Click the *Assign* icon. Choose the relationship *BQ## Has Possession of ## Vehicle*. Click the green check icon to accept.
 - c) On the *Search Term* screen search for your `##` Sales Vehicle. On the *Assignments* dialog box, select the *Period* pushbutton at the bottom of the pop-up screen. Enter **any 3 month period in the coming year**. In the dialog box, choose *Save*. Select your next Organizational unit and repeat the steps to assign the vehicle to another Organizational Unit during another three month period in the coming year. Repeat these steps until all four organizational units have the vehicle assigned for 3 months each in the next 12 month period. Hint - from the *Edit* menu turn the validity period column on.
8. View the assignments through a report both as an ABAP list report and as a graphic report.
 - a) From the *SAP Easy Access* screen, choose *Human Resources > Organizational Management > Info System > General > Structure Display/Maintenance*.
 - b) On the *Report Selection* screen, the *Plan Version* is 01. *Object type O*. For the *Object ID* search for and select your `##` National Sales Org Unit. In the *Reporting period* select the radio button for *All*. Enter the Evaluation Path `z_40+##`. Choose *Execute*. View the results. To see the report graphically, select the first line for your `##` National Sales Office and select the *Structural Graphics* icon. On *Structural Graphics*, choose *View Options* and then *Type Oriented*. Choose *Apply* and *Continue*. You can only see the validity period from the first report not structural graphics. To exit Structural Graphics, choose *Cancel*.
9. Produce a report of the Vehicles assignments to the organizational structure. See units on either General Structures or the Evaluations and reports in OM for hints.
 - a) View the assignments through a report both as an ABAP list report and as a graphic report. From the *SAP Easy Access* screen, choose *Human Resources > Organizational Management > Info System > General > Structure Display/Maintenance*.
 - b) On the *Report Selection* screen the *Plan Version* is 01. *Object type 45*. For the *Object ID* search for and select your `##` Demo Vehicle. In the *Reporting period* select the radio button for *All*. Enter the Evaluation Path `z_70+##`. Choose *Execute*. View the results. To see the report graphically, select the first line for your `##` Demo Vehicle and select the *Structural Graphics* icon. On *Structural Graphics*, choose *View Options* and then *Type Oriented*. You can only see the validity period from the first report not structural graphics.